United States
House of Representatives
Financial Systems Replacement

Request for Proposal (RFP)
OPR04000432

Contact:
Lawrence Toperoff
Director of Procurement
Office of Procurement
356 Ford House Office Building
Washington, DC 20515

Table of Contents

1 EXECUTIVE SUMMARY

1.1 BACKGROUND

In December 2002, the Committee on House Administration (CHA) approved the CAO's proposal to proceed into the Acquisition Phase of the FSR Project. In order to ensure that the House selects the software and the integrator that provides the best value, the House has chosen to independently select the software and integration services. In addition, the House will procure Independent Verification and Validation (IV&V) services through a separate contract vehicle to monitor the implementation process to ensure quality delivery.

The House has selected two software solutions that best meet the needs of the House and reflects the best overall value. This decision was based on the software's ability to meet the House's functional and systems requirements through functional fit, technical approach and overall value of the solution. Integrators (Potential Offerors) are expected to choose one or both software products selected by the House and propose solution(s) identified by this Request for Proposal.

1.2 VISION FOR THE FSR PROJECT

The Financial System Replacement Project (FSR) vision is to provide Members, Committees, Leadership, and other U.S. House of Representatives (House) entities with one House Financial System that is easy to learn, easy to use, and simplifies the daily processes of budgeting, requesting, tracking, and managing office expenditures for all goods and services. This will be accomplished through maximized use of electronic (paperless) transactions that significantly reduce the time to submit, process, and fulfill office requests.

Each office will have direct access to "real time" financial data for their office, from one source, to facilitate planning, forecasting and accounting for expenses including purchases, payments, equipment maintenance and payroll. Offices will be able to order goods and services online and approve payments by generating electronic documents.

The envisioned system will significantly improve the ability of the Chief Administrator's Office (CAO) to support Leadership, Members, Committees and other House entities by improving electronic access to goods and services outside the House community.

The envisioned House Financial System will enable the CAO to take a major step in fulfilling its Mission Statement, which reads - "*Our mission is to provide excellent and efficient service to the U.S. House of Representatives. We are one team, proactive and professional, focused on the evolving needs and expectations of Members and the House community.*" The FSR project supports the CAO service mission in three ways: first, by moving away from the current inadequate disparate system environment and providing desktop access to accurate, comprehensive and timely financial information and services; second, by providing a secure, integrated in-house solution that safeguards data from unauthorized access,; and third, by providing a House infrastructure that will streamline and be adaptable to changes in House business operations and services.

1.3 DOCUMENT PURPOSE AND ORGANIZATION

The Office of the Chief Administrative Officer (CAO) has developed this Request for Proposal (RFP) for integration services of a new Financial Management System (FMS), which may also include the acquisition of Software and Hardware. This document covers the:

- Background and vision of the proposed new system
- Business and technology environment
- Scope of needs and requirements
- Elements for developing a performance based contract with Potential Offerors
- Instructions for responding
- Tasks, deliverables and milestones
- Evaluation criteria
- Program management

This RFP requests that Potential Offerors, in consideration of their expertise with the selected products in the Federal marketplace, propose the best solution for integration and implementation for the House with the best overall value based on our defined objectives. This proposal allows for optional pricing for hardware and software combined with integration services.

Potential Offerors may bid to implement one or both of the two software solutions identified by the House. If a Potential Offeror chooses to bid both software solutions, each software solution must be submitted in a separate proposal

Current Situation – This section describes the current business and system related challenges. It provides the justification for the new solution through program goals and objectives. This section also identifies the current users, transaction volumes, existing systems and their interfaces, business functional areas, and concurrent initiatives.

House Solicitation Process – This section describes for Potential Offerors, the House's solicitation process, schedule and method by which the solution will be acquired and how the House will evaluate responses. It defines all Contract Line Item Numbers (CLINs), identified as milestones with deliverables, which will be used as the framework for performance-based contracting. It also describes our phased approach toward implementing functionality of the system.

Pricing – This section describes how the Potential Offeror should price the solution, considering best value for both the Potential Offeror and the House, including Fixed Cost and Time and Materials alternatives for each CLIN in detail.

Requirements Response – This section describes how the Potential Offeror must address how the Commercial Off The Self (COTS) solution will fulfill every functional requirement. Customization and Level of Effort are defined in this section.

Systems Requirements – This section outlines the technical requirements the Potential Offeror's solution must satisfy with special consideration of the current or proposed House technical environment.

Potential Offeror's Proposal – This section outlines the required format of the deliverables that the Potential Offeror must include in its proposal.

Customer Care – This section describes the House's requirements for customer and system support for the full project life cycle.

Appendices – The appendices contain the Table of Contents for the Potential Offeror's response as well as tables identifying the Hardware and Software currently supported by the House.

2 CURRENT SITUATION

2.1 BACKGROUND

In December 2002, the Committee on House Administration (CHA) approved the CAO's proposal to proceed into the Acquisition Phase of the FSR Project. Subsequently, the financial management system currently being used by the House, Federal Financial System (FFS) was removed from the Joint Financial Management Improvement Program (JFMIP) schedule, effective July 31, 2003. These factors, accompanied by more modern JFMIP compliant systems available in the market today, as well as the need to consider a more user friendly, efficient and accessible replacement system for all House offices has raised the level of importance and urgency to acquire a replacement system for FFS.

Rather than issuing a single statement of work requesting software and integration services, the House has chosen to independently select the software and integration services. This unbundled approach will ensure that the House selects the software solely on the ability of the software to meet the needs of the House. In addition, the unbundled approach will also ensure that the House chooses the best possible integration services for the software that the House selects. Specifically, the House will procure the financial system replacement software, hardware, and integration services to implement the software, and concurrently acquire Independent Verification and Validation (IV&V) services to monitor the implementation process to ensure quality of delivery. The House has selected the two software solutions, PeopleSoft Financial Management Solutions v8.8, with Prism by CompuSearch, and SAP America MySAP ERP v4.7, with IPRO by SAP America, that best meet the needs of the House and reflects the best overall value. This decision was based on the software's ability to meet the House's functional and systems requirements through functional fit, technical approach and value of the overall solution. The purpose of this RFP is to solicit integration proposals in order to select a systems integrator that best meets the needs of the House. Potential Offerors may bid to implement one or both of the two software solutions identified by the House. If a Potential Offeror chooses to bid both software solutions, each software solution must be submitted in a separate proposal.

2.2 PROGRAM OBJECTIVES

The CAO is committed to implementing a replacement system for FFS that not only provides the required functionality for House financial operations but also ensures that all House financial operations that rely on, but are not part of FFS can either be used in conjunction with, or be replaced by the new system. In doing so, the CAO has an opportunity to:

- Provide a more user friendly, efficient, and robust financial system that is accessible to all Leadership, Members, Committees, and other House entities.
- Improve the timeliness of financial data contained within House systems by utilizing a single point of entry.
- Streamline business processes related to House financial operations in order to improve the responsiveness of the CAO to fill requests for goods and services.
- Provide the House community with a COTS solution that simplifies House financial processes and document routing through a higher level of integration and a more robust work-flow engine.
- Significantly reduce the reliance and support requirements for disparate, legacy financial application systems and interfaces that are currently maintained and operated within the CAO.

The intent of the FSR Project is to utilize best practices in the conduct and implementation of the engagement, including software selection, program management, configuration, integration, testing, training, and customer support. Highlights of the FSR Project Best Practices to be applied to solution acquisition include the following areas:

- COTS Package Enabled Business Process Design

- Phased Acquisition
- Performance-based Contracting
- Software Vendor Expertise in Integration Process
- Outsourcing Design and Implementation Services
- Award per Contract Line Item Numbers (CLIN)

2.2.1 Business Volume

The House experiences little annual growth in its funding for operations. It is anticipated the system will support the management of approximately $1.2 billion in appropriated funds.

It is expected that with the implementation of the FSR solution transaction volume will both change and increase since the objective is to transition from over 5 legacy systems, as well as numerous stand-alone financial management systems maintained throughout the user community to a single integrated system. However, for the purposes of this response, the following information is reflective of the type and volume of business performed:

- 45,000 purchase order lines processed in FFS annually
- 11,250 purchase requests processed in FFS annually
- 300,000 payment lines processed in FFS annually
- 32,000 receipt of good lines processed in FFS annually
- 135,000 additional journal vouchers (General Ledger (GL) transfers) lines processed in FFS annually. The majority of these transactions come from subsidiary systems through batch processes
- 165,000 transaction lines processed in FFS annually coming from the payroll interface (these are also journal voucher lines)
- 100,000 records stored in the Potential Offeror's file for FFS. Potential Offeror's records consist of both external Potential Offerors and employees who have payments issued to them by the House
- 90 contracts are processed annually in PD (Procurement Desktop)
- 175,800 total accountable property items
- 16,600 accountable property items acquired in a year
- 19,100 accountable property items transferred in a year
- 17,200 accountable property items disposed of in a year

Quantified below is an average of system-generated documents for the procurement process during the previous two fiscal years:

- Purchase Orders - 18,799
- Purchase Order Modifications - 2,990
- Receivers - 17,341
- Receiver Modifications - 414

There are 70 Contracting Officer's Representatives (COR's) and 171 additional Points of Contact (POC's) for contracts. Storage for attachments for the last 4 years has been as follows:

- 1,050 M - 9/2000

- 1,825 M - 9/2001
- 2,959 M - 9/2002
- 6,303 M - 9/2003 - contracts in place for this period

2.2.2 Functionality

The current functionality of the House is described in the table below. These functions are currently performed by FFS and other independent systems and processes. The goal of FSR is to combine these functions into one COTS solution to be deployed in Phases.

FUNCTIONAL AREA	DEFINITION
Accounting and General Ledger	This function includes the performance of core financial management activities pertaining to general ledger management such as general ledger posting, accruals, closing and consolidation, as well as general ledger analysis and reconciliation. Specifically, this function includes management of the accounting/classification structure, daily transaction processing activities, and monthly and annual closes, as well as preparation for, support of, or response to audits, inquiries, or reviews. These activities generate a number of outputs that include an accounting classification structure as well as ongoing updates to that structure, various reports, updated system records, ongoing updates to the general ledger, and the preparation of consolidated financial statements. The functional requirements that correlate to the Accounting and General Ledger function are identified as either **GL, GL/Accounting, Core** or **Reporting** in the Module Column on the requirement spreadsheet.
Manage Budget	The Manage Budget function is the process of managing budget execution. Specifically, the Manage Budget function includes receiving and allocating budgetary authority, recording and monitoring allocated funds, and projecting potential budget surpluses and shortfalls in the executed budget. This function does not include the management of cost activities. The functional requirements that correlate to Manage Budget function are identified as **BUDGET** in the Module Column on the requirement spreadsheets.
Cost Accounting	The scope of the Manage Costs function includes core cost analysis. Performing core cost analysis consists of the activities of cost recognition, cost accumulation, and cost distribution by the appropriate responsibility segments, responsibility centers, funds, organizations,

	budget object classes, and projects. The functional requirements that correlate to the Manage Cost function are identified as **COST** in the Module Column on the requirement spreadsheets.
Purchasing	The scope of the Purchasing function includes the purchase and receipt of goods and services in accordance with House purchasing guidelines through one or a combination of methods (e.g., Federal Supply Schedule or other government agency contract vehicle, small purchase and simplified purchase procedures, sealed bidding or competitive proposals). The functional requirements that correlate to Purchasing are identified as **PURCHASING** in the Module Column on the requirement spreadsheets.
Manage Contract Lifecycle	The Contract Lifecycle Management function includes all types of commitments that obligate the House to an expenditure of appropriated funds and that, except as otherwise authorized, are in writing and become effective by written acceptance or performance. This function includes purchases from other government agency contracts or interagency agreements. It encompasses procurements made outside of the simplified acquisition process, under the sealed bidding or competitive acquisition process, as well as issued purchase orders of interest that require monitoring or surveillance by a Contracting Officer's Representative (COR). Some of the distinguishing factors may include, but are not limited to, dollar value, provisions of service, contract time frame, and complexity of goods or services being procured. The Contract Lifecycle Management function can include technical liaison, review and acceptance of deliverables, monitoring of contractor performance, and issuance of contract or purchase order modifications. The functional requirements that correlate to Manage Contract Lifecycle are identified as **CONTRACTS** in the Module Column on the requirement spreadsheets.
Inventory Management	Inventory Management is the process of determining inventory requirements through the functions of monitoring, receiving, storing, and distributing inventory items. Inventory management personnel must perform these functions within required federal and other guidelines that involve ensuring funds are available before purchase. The overall functional objective is to maintain sufficient inventory stock to meet user needs without overstocking, properly tracking items and recording expense. The functional requirements that correlate to Inventory Management are identified as **INVENTORY** in the Module Column on the requirement spreadsheets.

Asset Management	Perform Asset Management includes the activities of determining asset requirements, receiving, storing, distributing, and disposing of asset items, and tracking and monitoring of asset inventory. Asset management personnel must perform these functions within required federal and other guidelines that involve ensuring funds are available before purchase, and that asset inventory and depreciation expenses are properly recorded and tracked. The functional requirements that correlate to Asset Management are identified as **ASSETS** in the Module Column on the requirement spreadsheets.
Payment Management	The Manage Payments function includes the preparation, approval, scheduling, and processing of any transactions that result in the disbursement of Federal funds. Processes unique to the House of Representatives include the direct bill processing, consolidated billing management, processing of referenced payments, and payments of district office rent/leased automobiles. Support functions of payment management include resolution of inquiries and audit findings and compilation of processing statistics. The functional requirements that correlate to Payment Management are identified as either **PAYMENTS** or **PAYMENT MANAGEMENT** in the Module Column on the requirement spreadsheets.
Receipt Management	The Manage Receipts function supports activities associated with recording agency cash receipts, including servicing and collecting receivables. It is important to note that some receipts may be collected without a receivable having been established previously. In total, this function includes processing cash receipts, producing and updating receivables, and monitoring and collecting amounts due when necessary. Processes unique to the House of Representatives include the administration processing of repayment plans and contributions received for reduction of public debt. The functional requirements that correlate to Receipt Management are identified as RECEIPTS, **RECEIPTS MANAGEMENT** or **RECEIVABLES** in the Module Column on the requirement spreadsheets.
Travel Management	The travel management function consists of both Travel Expense Management and Travel Fulfillment. Travel Expense Management includes travel card management and replacement, request to travel submission and approval, reimbursement, audit, settlement and reconciliation. Travel Fulfillment includes reservations, ticketing, and audit of airfare, train fare, hotel, and car rentals.

	The functional requirements that correlate to Travel Management are identified as TRAVEL in the Module Column on the requirement spreadsheets.

2.2.3 Applications

With the exception of Synchronics, Finmart, and the Work-Order Management System[1], the following table lists the applications which will be replaced by the FSR solution and associated support services from HIR and each business unit as described in section 2.2.7.

APPLICATION	DEFINITION	Current Support Services
FFS Core Financials	An AMS mainframe-based Commercial Off-The-Shelf (COTS) product modified by House and operated through a cross-servicing arrangement with Department of Interior's National Business Center. This is the House Core Financial management system.	Office of Finance – Level 1, 2 & 3 HIR Telecomm - Level 2 National Business Center – Level 3 Software Vendor – Level 4
Finmart	Finmart is the datamart/data warehouse used for end-user reporting of data from FFS. Data from FFS is loaded into Finmart through an ETL process utilizing Microsoft Data Transformation Services. Finmart is comprised of a SQL database with end-user reporting utilizing a MicroStrategy Business Intelligence toolset. In addition to containing historical data from FFS, Finmart also contains historical data from OTMIS, an FFS subsidiary accounting system that was converted into FFS in April, 2003.	Office of Finance – Level 1, 2 & 3 HIR - Level 2 & 3 Software vendor – Level 4
PD Procurement Desktop	A customized version of an AMS application that supports initiation of purchase requests and generation of purchase orders, solicitations, awards, orders, and other contract related documents for CAO-processed purchases and other Officers of the House. PD supports receiving information and management and tracking of status of purchase requests, contracts, purchase orders, and receipts.	Office of Procurement – Level 1, 2 & 3 HIR - Level 2 & 3 Software vendor – Level 4
Fixed Asset and Inventory Management System (FAIMS)	A client server-based system for managing assets of the House. FAIMS is based on the COTS Oracle Financials product and has some degree of customization. FAIMS also establishes and submits payment requests to	House Support Services (HSS) – Level 1, 2 & 3 HIR - Level 2 & 3 Software vendor – Level 4

[1] Note that the mainframe work-order management system is not in scope for this project. However, there are specific work-order management requirements that are in scope which are defined in the compliance matrix.

APPLICATION	DEFINITION	Current Support Services
	FFS. It is planned that the inventory module and additional custom functionality will be incorporated into FAIMS.	
FMS (Financial Management System)	Legacy inventory main frame system used to record and process information gathered during the "Requisition" and "Payment" sub-processes. Originally associated with assets and inventory. Inventory is all that remains for purposes of this project. The inventory (FRC) is on the House Mainframe, an IBM computer with and OS/MVS operating system. The database files are ADABAS files and the programming language used is NATURAL. Both ADABAS and NATURAL are products of Software AG.	HIR - Level 1,2 & 3 OF – Level 2 & 3 HSS – Level 2 &3
Congressional Accounting and Personnel System (CAPS)	A PC-based software application written in FoxPro and designed to help congressional offices keep an accurate accounting of funds used for their official expenses. Its two modules (Accounting and Personnel) allow offices to create and track (including forecasting) their budgets, create vouchers for the payment of expenses, generate payroll forms (e.g. salary adjustments, overtime.), maintain personnel data, and reconcile expenses with House financial statements. CAPS is a stand-alone application that does not interface with either the House HR/Payroll system or FFS.	HIR - Level 1,2 & 3
MCBA Synchronics Point of Sale (Multiple Computer Business Application)	Synchronics is a Point of Sale (POS) application that enables computers to function as cash registers. This application allows users to enter sales and returns, generate receipts, lookup prices, and query inventory. MCBA is a back-office accounting application that records sales of office supplies, maintains inventory, contains purchasing and receiving functions for inventory replenishment and generates charge-backs to offices which is passed back to FFS through the OSS/Office Supply Store monthly interface to FFS. Although MCBA and Synchronics POS are two separate software applications, they are tightly	HSS – Level 1, 2 & 3 HIR - Level 2 & 3 Software vendor – Level 4

APPLICATION	DEFINITION	Current Support Services
	integrated and interdependent. Currently, both systems are required for Office Supply Store operations. The business area within the scope of this project is the back-office accounting functionality of MCBA (refer to the MCBA/Synchronics Replacement Project in Section 2.3 for more details).	
Hyperion Enterprise	Hyperion Enterprise is a financial consolidation, reporting, and analysis application and is used by the House to compile and generate the House of Representative's annual financial statements.	Financial Systems – Level 1, 2 & 3 HIR - Level 2 & 3 Software vendor – Level 4
Work Order Management System	A stand-alone mainframe application that enables customer tracking, work order scheduling and management for House Support Services.	House Support Services – Level 1, 2 & 3 HIR - Level 2 & 3

2.2.4 Function to System Mapping Table

This table maps the current Applications to the Functions. Each function is mapped to a CLIN, as represented in the first row.

CLIN	2	2	2	2	2	3	4	5	6	7&8	9	10&11
Application/ Function	**GL**	**Budget**	**Cost**	**AP**	**AR**	**Purchasing**	**Contracts**	**Inv**	**Asset Mgmt**	**Travel**	**Retail**	**Data Warehouse**
FFS	X	X	X	X	X	X						
PD						X	X					
FMS								X				
FAIMS					X				X			
CAPS		X		X		X						
MCBA				X	X	X		X			X	
Hyperion Enterprise	X											
Work Order Management System												
Finmart												X

2.2.5 Interfaces

The House Financial System, considered a single entity with clearly defined boundaries, has interfaces with other processes and systems as described below:

- Financial Systems and Datamart
    1. PD real-time to FFS: Vendor updates and purchasing activities, e.g. requisitions, awards (purchase requests, contracts, purchase orders, blanket purchase agreement (BPA) calls, receipt of goods.
    2. PD view to FAIMS: Provides data for establishing assets and initiating payments upon receipt of assets.
    3. FAIMS Daily to FFS: Requests payment from FAIMS that generate payments/disbursements from FFS on maintenance contracts, equipment purchases, accountable property.
    4. FAIMS Monthly to FFS: Transmits GL transactions for depreciation, internal asset transfers, dispositions, interoffice expense transfers.
    5. FFS daily to Datamart: Data extract to reporting warehouse.

- Staff Payroll
    6. Payroll monthly to FFS: General ledger transfer to record payroll expense and associated withholding expenses.
    7. Student Loan Program monthly to FFS: Generates checks and Electronic Funds Transfer (EFT) payments to vendors for student loan payments made on behalf of employees.

- Treasury and Federal Reserve
    8. FFS daily to Treasury: Electronic file to Treasury that generates check disbursements.
    9. FFS daily to FRB: Electronic file to Federal Reserve that generates EFT disbursements.

- Government and Non-Government House trading partners
    10. Boise Cascade bi-weekly to FFS: Incoming invoice/payment requests for office supplies from vendor.
    11. Perrier Group monthly to FFS: Incoming invoice/payment requests for bottled water from vendor.
    12. United Parcel Service (UPS) monthly to FFS: Incoming invoice/payment requests for shipping from vendor.
    13. Federal Express (FedEx) weekly to FFS: Incoming invoice/payment requests for shipping from vendor.
    14. Cingular monthly to FFS: Incoming invoice/payment requests for wireless charges from vendor.
    15. Transit benefits monthly to FFS: Incoming invoice/payment requests for metro fare cards from vendor.

- Internal Service Providers
    16. PIX Photo Shop monthly to FFS: GL interoffice expense transfers for internal charge-back for services.
    17. HRS/House Recording Studio monthly to FFS: GL interoffice expense transfers for internal charge-back for services.
    18. Telecom/MONIES monthly to FFS: GL interoffice expense transfers for internal telecom charge-backs.
    19. Office Supply Center (OSC) monthly to FFS: GL interoffice expense transfers for internal office supply charge-backs.
    20. Graphics monthly to FFS: GL interoffice expense transfers for internal graphics charge-backs.

- FedBizOps
    21. PD periodic to Federal Business Opportunities (FedBizOps): Posts solicitations to FedBizOps.

2.2.6 Current Systems Environment

See Appendices 9.2 and 9.3 for list of House-supported software and hardware.

Network
Communications Policy 001.0, approved by CHA on 11/7/2000, requires that all network communications that travel outside of a single workgroup (or "subnet"), and that are transported by shared House facilities shall use the Internet Protocol (IP).

General Description of the Communications Data Network (CDN)
House Information Resources (HIR) provides connectivity among five buildings occupied by House Members, staff, and support services. These buildings are the United States Capitol building (the Capitol), the Cannon House Office Building (CHOB), the Longworth House Office Building (LHOB), the Rayburn House Office Building (RHOB) and the Ford House Office Building (FHOB).

The House has installed a large campus network among these five buildings and has standardized on Cisco network devices. The House is in the process of upgrading its current Campus Data Network architecture to Gigabit Ethernet to replace the current ATM core. The new layered architecture consists of Core, Distribution and Aggregation Layer 2/3 switches and will be deployed in order to support a delivery of high bandwidth applications to the desktop (e.g., streaming video). The CDN extends to the Member and Committee offices through 10/100 Mbps switches and will connect Member Offices to the Gigabit Ethernet Aggregation Layer.

General Description of the WAN
The House has a large Frame Relay network consisting of 6 muli-megabit circuits supplying connectivity to Remote District Offices. Each Multi-megabit circuit consists of 8 T-1 circuits for 12Mbps each. Capitol Hill Campus head quarter circuits support over 740 remote Frame Connections to Remote District Offices. The current District Office breakdown is 442 512Kbps circuits, 91 256Kbps circuits and 212 56Kbps circuits.

The House also supports 50 multi-user Offices and 44 single user offices with a Virtual Private Network (VPN) service. This service uses the Cisco 1720/1721 client and software client for multi-user offices and single user offices respectively. It is anticipated that over 200 satellite offices and 100 individual users will be provided with a VPN connection service to the House Network. These VPN connections will provide remote access to House resources via the public Internet. Hardware and Software clients will be deployed to supply this service.

General Description for the House's Internet Connection
The House currently uses redundant Internet Connections (T-3) from several providers. Each Internet connection is capped at 27Mbps. There are plans to increase the House's connections to a mixture of OC-3 and T-3 connections to take into account increased Internet demand.

Systems and Client
The systems operating environment at the Ford House Office Building consists of over 200 servers of which approximately 85% are Windows based systems running on HP/Compaq ProLiant servers. The remaining servers consist of UNIX based systems running on Sun and Intel hardware platforms. Although the Windows based systems currently operate on both NT 4.0 and Windows 2000 operating systems all NT 4.0 servers will be upgraded to Windows 2000 beginning in Fiscal Year (FY) 04 (and extending into FY05.) HIR also maintains an IBM 390/2300 mainframe used to support specialized applications with non-mainframe migration replacement projects in progress. The systems operating environment supports a user base of approximately 12,000 Members and staff located on the Capitol Hill campus and in District offices throughout the country.

2.2.7 Current Support Services

House Information Resources (HIR) is our Information Technology business unit which has primary responsibility for support of the technology infrastructure and applications of the House. Currently it operates with multiple levels of support services (highlighted in the applications table in section 2.2.3). While each business unit supports their core business application, there is shared responsibility between HIR and that unit. HIR services range from the desktop to the Internet (Web, Data Storage Protection - Phones, Network, Communications, Training and Information Security Support). The composition and responsibilities of HIR are as follows:

- Information Systems Security

  HIR Information Systems Security Office provides the following services:
  - Develop and implement security policies and guidance,
  - Design network security technical controls and administer data protection mechanisms,
  - Conduct systems security certification and compliance audits to identify and mitigate risks,
  - Develop and implement security awareness and training programs,
  - Detect and resolve malicious incidents such as virus and intruder attacks.

- Client Services

  Is comprised of Technical Support Representatives (TSR), Call Center staff, Engineering Support and the trainers of the House Learning Center. The mission is to provide Information Technology support for the House.

  - House Call Center (Level 1)

    The HIR Call Center is open 24 hours a day, 7 days a week. The HIR Technical Support Call Center provides a single point of contact for Information Technology support and is considered first level of support. Systems Support Engineers are dedicated to answering questions and resolving technical problems for software and the House computer infrastructure. The primary focus is to provide troubleshooting assistance to customers in the areas of hardware issues for computers and printers, messaging software, web browsers and other applications on the House Supported Software list and to resolve those problems on the first call. They provide notification to the House community about maintenance and outages in the House computer infrastructure through e-mail and web-based alerts.

    All customer requests are logged into the Remedy customer tracking system, which generates a work order request number used to track the status of the request. Requests that cannot be resolved by the Call Center on the first call will be assigned to the appropriate group for resolution and follow up, second level support. Although the House community is encouraged to contact the Call Center for quick responses to routine computer-related problems and usage questions, an office's primary support personnel is the assigned Technical Support Representative (TSR), used primarily for second level support regarding software and hardware issues.

  - Technical Support Representatives (Level 2)

Technical Support Representatives (TSRs), considered second level support, serve Members, Committees and House offices as advisors on information technology issues and purchases. TSRs provide technical solutions in support of desktop computers, software applications, personal digital assistants (PDAs), and local area networks. Each House office is assigned an individual TSR who is assigned to a TSR Team. This provides for personalized customer service and backup support to ensure timely response to customer requests.

- House Learning Center

  The House Learning Center, located on campus, offers a full spectrum of training courses in both classroom and online settings for common front office desktop products to customized back office operations support classes. The learning center uses networked computers in its classrooms using software such as Groupware to facilitate training.

- Information Management

  HIR Information Management is responsible for supporting the House infrastructure, specifically the applications and their supporting platforms, Web services, messaging, and the data center. This groups primary responsibility is operations and second and third level support.

- Communications

  Provide telecommunications services for the House, such as phone lines and data lines and related services.

2.3 CONCURRENT INITIATIVES

Over the next three years, the House plans to implement the following initiatives. While these initiatives are outside the scope of the FSR solution, we feel it is imperative for the Potential Offerors to be aware that these initiatives are concurrent and may have impact on the implementation. There is no plan to expand existing CLINS or add new CLINS to include these initiatives.

MCBA/Synchronics Replacement Project

There is currently a project underway to replace both MCBA and Synchronics due to the fragile nature of the existing system. The current scope of this effort includes requirements for modularity between the back-office accounting functions of MCBA and the Point of Sale functions of Synchronics. The purpose of this modularity is to allow the back-office accounting functions performed by the MCBA replacement to be subsumed by the FSR, if the House chooses to execute CLIN 9 (see Section 3.2).

Work Order Management System

The Office of House Support Services has developed new business processes and workflows to support the organization. These changes present the need to develop a system that supports business operations. The goal is to develop a system that: enables web-based service requests, provides a common platform for customer and service request/work order tracking, enables work/resource management, planning, and scheduling (to include employee management and shop production) and interfaces with existing and/or planned purchasing, financial, asset and inventory, performance measurement, and decision support systems as needed.

Strategic Initiative Proposal (SIP) Number 6

The objective for this initiative is to establish high-level organizational measures and link these measures to an individual employee's performance plan and evaluation. This will include the development and implementation of a performance management system in two phases. Phase I will include the implementation of a Balanced Scorecard (BSC) performance management system and Phase II will include the integration with an employee performance management system.

Strategic Initiative Proposal (SIP) Number 7

The objective of this initiative is to develop a structured Business Process Improvement Program that facilitates continuous improvement of the CAO's critical, core business processes (or sub-processes) and enhances organizational effectiveness and efficiency.

Strategic Initiative Proposal (SIP) Number 9

The objective of this initiative is to create an organizational structure that can accommodate the changing needs of our customers. This will include the identification and adoption of a new customer service delivery model that can accommodate the changing needs of our customers.

Strategic Initiative Proposal (SIP) Number 10

The objective of this initiative is to establish a cost management program to provide CAO decision makers with better information on resource allocation and utilization. This will include the implementation of an activity based cost modeling tool.

Strategic Initiative Proposal (SIP) Number 11

The objective of this initiative is to develop and implement a resource allocation process that supports both strategic initiatives and general business operations.

3 HOUSE SOLICITATION PROCESS

3.1 CONTEXT OF FSR SYSTEM INTEGRATOR REQUEST FOR PROPOSAL: OVERVIEW

This section provides a review of the full FSR solicitation process, including the identification of software-based financial management applications that preceded this solicitation.

Prior to issuing this RFP, the House identified the two software products ,PeopleSoft Financial Management Solutions v8.8, with Prism by CompuSearch, and SAP America MySAP ERP v4.7, with IPRO by SAP America, determined to best meet the needs of the House based on both written responses and Operational Capability Demonstrations (OCDs). The purpose of this RFP is to solicit systems integrators (Potential Offerors) to propose their recommended implementation solution(s) for one or both software products. If Potential Offerors would like to bid to implement both of the software products, a separate proposal must be submitted for each software product.

In responding to the RFP, each Potential Offeror will be required to submit cost proposals separately for software, hardware and integration services. However, if the House identifies preferred pricing for software and/or hardware, the House reserves its right to purchase the software and/or hardware from other vendors.

The potential offeror will be asked to explain the nature of their teaming relationships with sub-contractors and the House, as well as their relation with the proposed software vendor, section 3.2.

The final award will be based on conformity to the solicitation requirements and on which Potential Offeror's proposed solution is deemed the best overall value by the House, when all relevant factors are considered. The award will be issued in multiple or single CLINs, by phase. The multiple CLINs by phase begin with a pilot phase, Phase 0 (CLIN 1), followed by Phase I that contains at a minimum production implementation of core financials (CLIN 2), and completed with subsequent phases that roll out additional functionality. See Section 3.2 for more information on implementing the CLINs in phases. The House will use specific milestones, deliverables, and approval/sign-off points, along with key performance-based contracting elements to assess the project at various points to ensure successful delivery of products and services.

The House has decided to enter into an agreement with elements of performance-based contracting enabling the House to award or deny subsequent CLINs based on predefined performance indicators, standards, metrics, incentives and quality acceptance levels. Using this approach, the House will limit the initial award to the first contract line item, the Gap Analysis/Gap Resolution (GAGR) Pilot. The House will not commit to moving into full implementation until after the selected integrator has successfully completed the GAGR Pilot.

The criteria for assessing the results of each CLIN, including the GAGR Pilot, will be developed and agreed upon by both the Potential Offeror and the House and will be expressed in terms of Performance Based Contracting Language. This language and criteria will be negotiated with the final Potential Offeror prior to award. The House reserves the right to (1) cancel, or rescind, (2) re-execute (3) re-compete individual CLINs for non-performance.

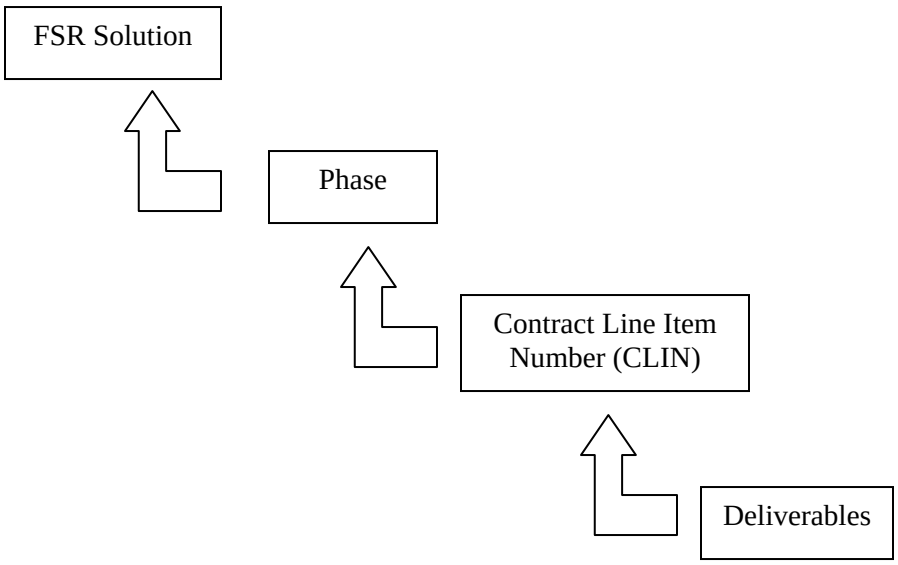
The acquisition of IV&V services will be concurrent with the award for integration services, allowing the House to contract with an IV&V vendor for each CLIN issued to the integrator, including the GAGR Pilot. The House may use the IV&V vendor's review of CLINs as one of the factors in determining the successful execution of individual CLINs, which may in turn influence the award of subsequent CLINs.

The House also will use specific milestones, deliverables, and approval/sign-off processes and checkpoints to assess the project during the implementation to ensure successful delivery of the desired functionality of the selected product. The

House reserves the right to cancel contracted products and services, based on non-compliance to performance expectations, or poor service quality levels provided by the Potential Offeror performance during the period of contract performance.

3.2 PHASED APPROACH USING CONTRACT LINE ITEM NUMBERS

The House plans to implement the FSR solution through a phased approach that will employ the use of Contract Line Item Numbers. Groups of deliverables make up a CLIN, a CLIN or group of CLINs makes up a Phase, and all Phases make up the Solution. The hierarchy of this phased approach is shown below. Please note we are requesting from the Potential Offerors their recommendation, based on their past experience, of an implementation strategy which most effectively and efficiently delivers functionality with minimal impact and provides the best value to the House.



The House is expecting a proposal in which Potential Offerors present a phased approach. Phases are the implementation of a CLIN or group of CLINs that are organized in a way to minimize negative impact to the House. Examples of negative impacts to the House include:

- Increased cost of decommissioning disparate systems.
- Increased use of human resources.
- Cost of developing and maintaining temporary interfaces between new and old systems.
- FSR constraints due to functionality not available in interfacing legacy systems
- Complexity of conversion.
- Impact on system users.
- Risk of impacting the House's operations.

Each Potential Offeror's phasing approach should be provided using the following table format:

Phase	CLIN(s) To Be Included in Phase

The Potential Offeror must describe the methodology behind the proposed phases including potential advantages and disadvantages to the proposed approach. The description of phasing approach should be included in the response section on *Integration Methodology*. The offeror must also explain the inter-relationship of the proposed methodology and phases considering, at a minimum, the following:

- The Offeror's proposed deliverables[2]
- The Offeror's proposed performance Based contracting requirements, standards, metrics, incentives and quality acceptance levels[3]
- Permanent and temporary interfaces
- Implementation timing of software modules, anticipated software releases and third party software
- The Offeror's approach to process change
- The Offeror's approach to conversion. The description of conversion approach should be included in the response section on *Conversion*.
- The Offeror's approach to training. The description of training approach should be included in the response section on *Training*.
- The composition of all teaming agreements
- The Potential Offerors relationship to the proposed software vendor

[2] Refer to Sections 7.3 for required deliverables as well as the associated content and description of those deliverables.

[3] Refer to Section 3.4 for requirements associated with performance based contracting.

CLINs are defined in the table below.

CLIN #	CLIN NAME	DEFINITION
1	GAGR	Gap Analysis, Gap Resolution Pilot described in Section 3.3.8
2	Core Financials (Accounting and General Ledger, Budget Management, Cost Accounting, Payment Management, Receipt Management)	Refer to functionality definitions in Section 2.2.2
3	Purchasing	Refer to functionality definitions in Section 2.2.2
4	Contract Management	Refer to functionality definitions in Section 2.2.2
5	Inventory Management	Refer to functionality definitions in Section 2.2.2
6	Asset Management	Refer to functionality definitions in Section 2.2.2
7	Travel Expense Management	Refer to functionality definitions in Section 2.2.2
8	Travel Booking	Refer to functionality definitions in Section 2.2.2
9	Retail Sales	Back office accounting functionality includes the proper configuration of the functional areas identified in CLIN 2, 3 and 5 for retail operations as well as interfacing functionality to point of sale. Retail sales does not include the point of sale system.
10	Data Warehouse Analysis and Implementation Plan	An integral part of the final FSR solution is end-user reporting utilizing a data warehouse. The purpose of this CLIN is to analyze the existing data warehouse (Finmart) to identify the best long-term approach for the FSR data warehouse. Potential implementation approaches could include modifying the ETL process to load data directly from the FSR to Finmart, replacing Finmart with the vendor supplied data warehouse component of the FSR software solution or a hybrid solution utilizing both Finmart and the vendor provided data warehouse.
11	Data Warehouse Implementation	The purpose of this CLIN is to execute the implementation plan developed in CLIN 10.

3.3 GUIDELINES FOR RESPONSE

This section describes for Potential Offerors, the House's solicitation process, schedule and method by which the solution will be acquired and how the House will evaluate responses.

3.3.1 Point of Contact

The Potential Offeror must provide the single point of contact and an alternate responsible for managing the response to this solicitation. The format for providing this information is below:

Potential Offeror RFP Response Contact Information	
Name	
Title	
Company	
Address 1	
Address 2	
City	
Zip	
e-mail	
Office Phone	
Cell Phone	
Alternate	
Name	
Title	
Company	
Address 1	
Address 2	
City	
Zip	
e-mail	
Office Phone	
Cell Phone	

3.3.2 Response Deadline

The response deadline is May 24, 2004.

3.3.3 Delivery Requirements

Section L of this RFP outlines the requirements for proper delivery of the Potential Offeror's response to this solicitation.

The Potential Offeror will submit their proposal, via email, no later than 2:00 pm on May 24, 2004 to Lawrence Toperoff (Lawrence.Toperoff@mail.house.gov) with a carbon copy (cc:) to Ed Davis (Edwin.Davis@mail.house.gov), Office of

Procurement. An email message confirming receipt of the Response will be delivered to the each of the responding Potential Offerors.

3.3.4 Response Format

The Potential Offeror must provide a written response to this Solicitation in either Word or Excel format, compatible with Microsoft Office 2000, or Adobe Acrobat v5.0. The House provided the compliance matrix as an attachment to this RFP. Each Potential Offeror must complete this matrix as instructed and include it in its original format as part of their response. Responses must meet all requirements outlined in Section L of this solicitation and follow the formats outlined in this Statement of Work Table of Contents (Appendix 9.1).

3.3.5 Review Process

The House will conduct an initial review of Offeror's written proposals to determine if the qualifications of the key personnel and proposed staffing meet the House requirements. Proposals satisfying this criterion will then be thoroughly reviewed. Following this process, those Offeror's whose proposals are identified as best meeting the needs of the House will be asked to conduct an oral presentation detailing their proposed solution. The evaluation criteria for both the in depth written evaluation as well as for the oral presentation are (listed in no particular order) as follows:

- ***Qualifications of Potential Offeror's key personnel and personnel approach***
  This includes expertise in Federal sector financials, experience in implementation of proposed software solution, and experience using the proposed implementation method and approach.
- ***Past performance and references***
- ***The ability of the Potential Offeror's solution to meet the House's functional requirements***
- ***The ability of the Potential Offeror's solution to meet the House's system requirements***
- ***Potential Offeror's familiarity with the Federal sector and the House environment***
- ***Potential Offeror's management approach***
  This includes the approach to program and project management, risk management, and change management as well as access to senior management.
- ***Potential Offeror's corporate capabilities***
  This includes the Potential Offeror's long-term viability, experience in Federal financials and proposed software, and organizational strength and weaknesses
- ***Potential Offeror's technical approach***
  This includes proposed tool and methods as well as the proposed approach to integration, extensions/customizations, transition to sustainment, and training
- ***Potential Offeror's cost proposal***

Those selected to participate in the oral presentations will be notified as to when they will participate. The dates of these oral presentations will be randomly selected and no exceptions to the schedule will be permitted. These oral presentations will take place at the Washington, D.C. Capitol Hill Campus.

The intent of the oral presentations is to have the Potential Offerors feature key elements of their solution and why it would provide the best overall value to the House.

The following instructions are intended for those who will participate and are considered complete.

- Each presentation will be 4 hours.

- Each presentation will be split into two sessions
- Each session will be two hours, consisting of a one hour presentation and a one hour question and answer period
- Session one will focus on program management and the House environment
- For session one the Potential Offeror is only allowed to have the following participants
    - Project Manager
    - Change Management Lead
    - Functional Lead
    - Participant of choice
- Session two will focus on implementation of the system (functionally and technically)
- For session two the Potential Offeror is only allowed to have the following participants
    - Project Manager
    - Functional Lead
    - Technical Lead
    - Participant of choice
- The presentation must be conducted so an audience of 20-30 people may participate.
- The presentation must be in electronic and paper format.
- The intent is to have a presentation displayed from a PC/Laptop through a LCD Projector.

3.3.6 Schedule

The key milestones of this Solicitation are outlined below:

Milestone	Elapsed Business Days from date of Release
Pre-solicitation Conference registration	3
Pre-solicitation Conference	5
Distribution of questions and responses from the pre-solicitation conference, as well as written questions received from Potential Offerors	9
Proposals Due	20
Oral Presentations begin	32
Oral Presentations ends	36

3.3.7 Contract Award and Announcement

The House will award the FSR system integration contract to the systems integrator determined to provide the best overall value to the House with their proposed solution. The award will be issued by CLIN, either individually or grouped by phase. The House reserves the right to issue individual CLINs based on the quality of performance of prior CLINs. See Section 3.2 for a more thorough description of this approach. The House reserves the right to cancel contracted products

and services, based on non-compliance to performance expectations, or poor service quality levels provided by the Potential Offeror performance during the period of contract performance.

3.3.8 Initial Award and Pilot

Using the approach to award the contract by CLIN (as described in the previous section) the House will limit the initial award to CLIN 1, the Gap Analysis/Gap Resolution Pilot (GAGR) Pilot. The House will not commit to moving into full implementation until after the systems integrator has successfully completed the GAGR Pilot described below.

The three month GAGR Pilot will verify, to both the integrator and the House, the software selected and the integrator, as a total solution, meets the business needs and requirements defined by the FSR. The following is the scope of the pilot:

1. House-specific business processes

- Dual Funds Control
  - The allocation of obligated or expended funds to both an annual or multiyear appropriated funding source and to a legislative-year spending limit. These are independent and parallel controls on member spending.
- The ability to maintain two sets of financial books: calendar year and government fiscal year.
- Disbursement through the Federal Reserve for EFT transactions and through Treasury for checks
- Internal billing of telecommunications charges (including a working interface with MONIES)
- Electronic routing and workflow associated with these processes
- Repayment Plans and Maintenance Agreements
  - The House gives Member Offices the option to purchase equipment on a payment plan. Items are purchased out of the CAO funds and members are charged a monthly amount via an inter-office expense transfer (e.g. 24 month installment payments). In addition, the House establishes contracts with outside vendors who provide equipment maintenance. Member Offices can purchase maintenance plans that are paid out of each Member's MRA on a monthly basis based on the equipment in the office's inventory. The CAO pays the vendor and then records an expenditure transfer to record the expense against the MRAs.
- Budget projections (CAPS functionality)[4] using payroll data from the payroll system
- Electronic routing and workflow

2. Phase 1 mandatory functional and technical requirements that were listed as requiring either extension or customization in the compliance matrix.

For both the House unique business processes and the requirements that would be met via extension or customization, the project team will determine the best approach for demonstrating the functionality within the timeframe of the pilot. The following are the options that will be recommended by the integrator for each business process or requirement:

- Demonstrate full functionality – Perform all system configuration and development of customizations/enhancements to meet House requirements.

[4] Refer to Section 2.2.3 for a description of the CAPS application/functionality

- Demonstrate working prototype – Develop screen designs, workflow and routing, report layout and simulate the proposed process in the pilot system.

- Perform a walk-through of approach – Develop a general design and "to-be" process flow describing how the gap would be resolved. It is not expected that this functionality would be demonstrated in the system, the walk-through should show how the solution interacts with the "out of the box" software.

The integrator will then present the proposed approach for approval by the House. Based on this approval, the project team will perform the appropriate design, development, testing and documentation. The integrator will then lead a walkthrough of these processes and requirements in a lab environment. The approach should include a teaming plan with the House project team, subject matter experts and selected end users to ensure they are part of the delivery and acceptance. The integrator should also be prepared to discuss the proposed approach for the implementation including project management, requirements management, design, development, testing, conversion, training and change management.

At the end of pilot testing, the integrator will provide a final report with the identified gaps and their resolutions (configuration, customization or process redesign) will be documented in a final report delivered to the House to assist in the determination of whether or not to proceed with implementation. Planning and design work, including high level project management plan, infrastructure technology design, concept of operations, resource plan, high level change management plan, and a high level customer care plan, in preparation for the first implementation phase will continue as the House reviews the results of the pilot test. It is expected that the House review of the pilot test results will take approximately 6 business weeks. Pricing (section 4) for the pilot should include all of the above activities.

Based on the review of the pilot report and the vendor's performance, the House reserves the right to potentially (1) cancel or rescind the contract award, (2) re-execute the pilot, (3) re-compete the systems integration RFP and (4) in the case it is discovered the software is deficient, re-compete the combined software selection RFQ and the systems integration RFP.

Note that the House expects the integrator to provide the environment and infrastructure (hardware, communications, etc.) for the GAGR Pilot. This includes supporting whatever operating systems, applications, and instances are required to execute the pilot. This also includes providing House personnel with access to the integrator's GAGR Pilot environment via the Web to allow House personnel to execute test scripts from the House campus. If necessary, the integrator should also provide workspace at the integrator's facility to execute portions of the test that require on-site work.

3.4 PERFORMANCE BASED CONTRACTING

Consistent with Best Practices, the House will employ Performance Based Contracting elements to establish and monitor overall quality and performance with performance indicators, standards, metrics, incentives and quality acceptance levels for each phase and the objectives defined for that phase. Offerors shall develop the performance metrics and measurement plan, and quality assurance plan including associated costs. Offerors shall provide an explanation of the factors and process used to determine each proposed performance based measurement (e.g., availability). The House will consider both the proposed specific measurements (e.g., 99% availability) and the supporting explanations as part of its proposal evaluation process along with incentives and penalties for each measure. The proposed measures will be evaluated by the House and a final performance-based structure will be negotiated with the offeror prior to the contract award. The following are objectives that the House would like to incorporate into the contract performance.

- Implement the phase on schedule and within budget
- Provide enhanced functionality to user community

- Minimize impact of new system on House operations
- House ownership of the new system and processes
- User acceptance and certification

4 PRICING

The House requires pricing to be detailed by CLIN (see Section3.2: *Phased approach using contract line item numbers*) for the following; software, hardware, and integration deliverables. In addition, the House requires pricing for integration deliverables for each CLIN to be detailed at the level of deliverable category. Deliverable categories and suggested deliverables are provided in Section 7.3: *Integration Deliverables*. Costs for each CLIN, and costs for each CLIN-deliverable category combination, should include the cost of all mandatory requirements as well as the cost of any value-added requirements associated with that CLIN for which an incremental cost has been identified in the compliance matrix.

For those costs that span CLINs, including grouped deliverables[5], the cost should be captured in the first mandatory CLIN where the cost would be incurred with a comment noting all CLINs with which the costs are associated. Where an integrator identifies multiple deliverables for a specific deliverable category, the integrator may choose to provide pricing for individual deliverables provided that the individual deliverable pricing rolls up to the pre-defined deliverable categories provided by the House in Section 7.3: *Deliverables*. The response format for pricing by CLIN, as well as, the response format for pricing of integration services by deliverable-category within each CLIN, is provided later in this section of the document.

The House requires the Potential Offeror to submit two quotes for each CLIN as well as two quotes for each integration CLIN/deliverable-category combination. One quote based on a time and materials contract, in the form of a not-to-exceed ceiling, and the second quote based on a firm fixed price contract. These quotes of firm fixed price and time and materials should be structured such that the House may choose to select either of these pricing structures per CLIN or Phase during implementation. The hourly rate by labor category must be based on GSA schedule pricing. In the event that the Potential Offeror is willing to provide a discount from GSA pricing, labor rates should be provided based on a discount percentage from the GSA schedule pricing. This instrument will streamline the future acquisition process and leverage purchasing power for additional tasks that are currently unidentified but within the scope of this statement of work. In addition, this instrument will remain in effect for the life of this contract.

For CLIN 11 (data warehouse implementation), Offerors may optionally provide only labor categories and labor rates. Total pricing (fixed and not-to-exceed) as well as pricing for each deliverable category may also be provided, but are not required.

Depending on the competitiveness of the cost proposals submitted by the Potential Offerors, the House may choose to request a second “best and final” cost proposal from each of the Potential Offerors. Note that for purposes of this RFP, no distinction is made between the terms “cost” and “price.” [6]

The House also reserves the right to re-negotiate the pricing structure for individual CLINs with the Potential Offeror awarded this contract while this contract remains in effect. Any re-negotiation of individual CLINs, including modifying CLIN pricing from time and materials to firm fixed price or vise versa, can only take place upon mutual agreement between the House and the Potential Offeror awarded this contract.

[5] Refer to Section 4.1: *Deliverables* for details about required deliverables and the grouping of deliverables across CLIN.

[6] In anticipation of a successful CLIN deployment, the need for additional licenses and functionality will exist and therefore the price proposals responding to this RFP must be fixed and exercisable by the House until September 30, 2005.

The following is the format that should be used to capture the pricing per CLIN:

CLIN	Software	Hardware	Implementation		Comments
			Fixed	Time & Materials Not-To-Exceed	
1	$	$	$	$	
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					

The following is the format that should be used to capture the pricing per CLIN-deliverable category:

CLIN	Implementation Deliverable Category[7]	Fixed	Time & Materials (NTE)
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			

Provide three (3) additional tables using the format below to provide the detail for the Time and Materials labor costs associated with the implementation, post-implementation support and technology support.

CLIN	Labor Category	GSA Labor Rate	Estimated Hours	Pricing = (Rate x Hours)

[7] Since each integrator is being asked to provide a list of suggested deliverables for each CLIN, this table cannot be pre-populated by the House. Rather, each vendor should group their proposed integration deliverables for each CLIN by the categories specified in Section 7.3 and provide pricing for each CLIN/deliverable-category combination.

5 REQUIREMENTS RESPONSE

The House requires that 100% of mandatory requirements be implemented with the Potential Offeror's solution. Please refer to the requirement matrices in Section J, Attachments 2 and 3. Each requirement is prioritized as Mandatory or a degree of Value Added. Within the matrices, Potential Offerors must interpret each requirement (functional and system) and indicate the compliance and level of effort for customizations, and extensions. Compliance and Level of Effort are defined below.

Additionally, the House has assigned each requirement to a functional area which in turn rolls up to a CLIN. The Potential Offeror may reassign requirements to other CLINs if it will result in a more efficient or cost effective integration effort. (e.g.: the House assigns a requirement to Contracts that is covered by the Potential Offeror's Purchasing Module). Potential Offeror must identify all requirements reassigned. The House assumes that the pricing for each CLIN includes all requirements, both mandatory and value added, that the Offeror has identified as meeting in the compliance matrix, including requirements met through extensions and customizations. The House also assumes that the level of customization or configuration effort identified in the compliance matrix to meet individual requirements represents the incremental cost of that requirement. This cost information can then be used as a means of negotiating the final pricing prior to award in the event that the House chooses not to implement some value added requirements.

Compliance
In the requirements matrices for each functional and system requirement, Potential Offerors must indicate the level of the proposed solution's compliance with House requirements. The four levels of compliance for responses are as follows:

- ***Fully Compliant.*** The solution is considered Fully Compliant if it is able to fulfill the requirement with out-of-the-box system functionality or if compliance can be met purely through configuration.
    - Configuration is defined as system setup that is performed with the front-end of the application and does not require new system code. Examples of configuration include setting system option flags and parameters, establishing reference data, adding existing fields to forms, or updating the layout of forms.
- ***Compliant with Extension.*** The solution is considered Compliant with Extension if an extension or third-party application is required that does not impact future upgrades to the COTS application.
    - An extension is defined as additional code or third-party software that is required to support House functionality which can be carried forward during an upgrade to the COTS application without the need for additional effort or re-application. This may include adding new fields to existing tables, adding new tables, adding new forms, developing interfaces, or developing reports or queries.
- ***Compliant with Customization.*** The solution is considered Compliant with Customization if a customization or third-party application is required that impacts future upgrades to the COTS application.
    - Customization is defined as additional code or third-party software that is required to support House functionality cannot be carried forward during an upgrade to the COTS application without additional

effort or re-application. This may include adding new fields to existing tables, adding new tables, adding new forms, developing interfaces, or developing reports or queries.

- ***Non-Compliant.*** The solution is considered Non-Compliant if it is unable to fully meet the requirement with out of the box system functionality and it cannot be extended, customized, or enhanced via a third-party product to meet the requirement.

If the solution is either Compliant with Extension or Compliant with Customization for a given requirement, Potential Offerors must provide an estimation of the labor hours required for the extension or customization, an estimate of the cost for extension or customization, and a brief description of the extension or customization required to make the software fully compliant. The description should include an estimated break-out of the level of effort between design, testing and development. In addition, if the response is Compliant with Customization, Potential Offerors must address how the customization will impact upgrades.

The House has down-selected to two possible software solutions: PeopleSoft Financial Management Solutions v8.8, with Prism by CompuSearch for contract management, and SAP America MySAP ERP v4.7, with IPRO by SAP America for contract management. Each Potential Offeror may propose either or both software solutions in separate proposals and must provide a compliance matrix for each proposal based on the specified software solution. This may include extensions or customizations to the contract management software (i.e., either Prism or IPRO, respectively) to meet requirements covered by the Contract Management CLIN as well as extensions or customizations to the base software (i.e., either PeopleSoft or SAP) to meet requirements covered by other CLINs (e.g. Purchasing). Costs for proposed extensions and customizations should be included in the cost matrices described in Section 4.

In addition, the Potential Offeror may propose an alternate solution for meeting requirements covered by the Contract Management CLIN that involves extensions or customizations to the base software (i.e., either PeopleSoft or SAP). The alternate solution for contract-management requirements, if any, should be provided in a second compliance matrix covering only the affected requirements. If an alternate solution is proposed, costs for proposed extensions and customizations associated with the alternate solution should be included in a second set of cost matrices as described in Section 4. The cost matrices for the alternate solution should only include costs associated with CLIN 4 (Contracts).

6 SYSTEM PERFORMANCE REQUIREMENTS

System requirements are submitted with this solicitation as Section J, Attachment 3. These system requirements should be used as a basis for detailed development of performance requirements identified in this section.

The House maintains a contemporary IT enterprise. For purposes of this response the Potential Offeror may assume that the House will continue to upgrade and improve its hardware, software and network infrastructure consistent with modern business practices. For purposes of evaluating the House network capabilities/bandwidth the following is provided:

- Over the next 3 years the House will upgrade its current ATM network backbone to single Gig-Ethernet Backbone.
- Over the next 3 years the House will upgrade its campus network desktop connections from a current shared 10Mbps Ethernet to a switched 100 Mbps Ethernet.
- Over the next 3 years the House will upgrade its wide area network (WAN) connections to 128 Mbps for at least one (primary) District Office for each Member.

- The House's current Internet Web Servers are designed primarily for providing static content and support approximately 1 million "hits" per day. The House is currently upgrading its Internet Web servers to support interactive browser-based applications.
- Over the next 3 years there are plans to implement portal capabilities.
- The House uses Microsoft Exchange as a centralized messaging capability. The House is currently upgrading its current Exchange-to-Exchange 2000.
- The House currently uses Microsoft NT as its network operating system and is migrating to Microsoft 2000 (or its replacement) over the next three years.

The House maintains a heterogeneous application and database server environment. Current server operating systems are predominately Windows NT Server or vendor-specific UNIX versions (e.g., Solaris). As a goal, the House strives to keep the number of different server operating systems to a minimum and therefore prefers solutions that are based on either a Windows NT Server (or its successor) or vendor-supported Unix. All hardware should be rack mountable.

6.1 PERFORMANCE EXPECTATIONS

The Proposed Offeror's solution must be secure, reliable, available, scalable, accessible, private, and interoperable to effectively achieve the vision of the FSR.

Potential Offerors should propose a plan, which includes House system subject matter experts, to run concurrently with the GAGR Pilot to identify, evaluate, and verify the system performance of the targeted versus current environments. Costing for this activity should be included in the cost estimate for CLIN 1, the GAGR Pilot. The House intends to contract with the Potential Offeror on a performance-basis and, therefore, wants to ensure that the standards are set with system performance measures for establishing a baseline from which to contract. These performance metrics may be developed during initial contract development as a baseline and may be adjusted, prior to approval of the next proposed phase, based on the results of the GAGR Pilot. The following sections identify the targeted areas the House deems relevant to system performance. Potential Offerors are encouraged to propose their overall best solution. The proposed plans should include a thorough analysis and review process of the technologies proposed to assist in the decision to acquire the infrastructure and platform technologies.

6.1.1 Availability

The Potential Offeror's proposed solution must provide for timely and reliable system access. The House recognizes that there will be need for periodic maintenance and updates to the system that must be enabled on a pre-scheduled basis. The Potential Offeror must provide an estimate of maximum availability along with a target value for percentage available to be used as a performance measure under the integration contract.

6.1.2 Accessibility

The application must be accessible through: application programming interfaces (API's) at the application level, web access, client-server access and File Transmission Protocol (FTP) access as described in the system requirements. In addition, as required by Section 508 Subpart A 1194.1, federal employees with disabilities must have the same, access to and use of, information and data as employees without disabilities.

6.1.2.1 WEB-ENABLED ACCESS

House Members, Leadership, Committees, and other House entities currently have web access to House internal and external web sites. The House FSR will be accessed via web browsers. Use of web technology is supported by the CAO's Strategic Technology Plan, FY2001-FY2005, which calls for "providing high-quality, web-enabled services to the House community."

The House Financial System will be supported by most of the commonly used browsers such as Microsoft Internet Explorer and AOL Netscape. Please reference the security requirements in Section J, Attachment 3 for Web-enables access requirements.

6.1.3 Scalability

The system platform must be architected so that simply by adding more hardware, it can support more users and records without degrading response time or performance.

6.1.4 Reliability

The system must ensure the integrity and consistency of the application, the information within and provided by the application and all of its transactions.

6.1.5 Interoperability

The Potential Offeror's solution must support interoperability with multiple software and hardware platforms.

6.1.6 Sizing Requirements

This system architecture will include a multi-tier design. Potential Offerors should suggest platforms based on the transaction volumes described in Section 2.2.1, requirements identified in the attached compliance matrix, and number of anticipated production-environment users provided in the table below. The users are classified as Casual, Light and Heavy.

The chart below is only in reference to estimated numbers and types of users:

Functional Area	***Casual Users—*** *Read only or informational users,* ***utilizing ad hoc query and pre-established reporting functionality.***	***Light User—*** ***Conduct transactions on a regular but not daily basis. Queries information.***	***Heavy User—*** *Named/Operational users* ***with almost full-time system interaction.***
Accounting and General Ledger		17	27
Asset Management	1200	150	32
Budget Formulation and Execution		1200	26
Inventory Management	1200	150	38
Payment Management		1200	77
Purchasing		1200	100
Receipt Management	1200	140	10
Contract Life Cycle	1200	60	15
Cost and Managerial Cost Accounting	1200	50	5
Travel		1200	0

6.1.7 Application Environments

The House anticipate a production environment based on the sizing requirements described in Section 6.1.6. In addition, the House will maintain at least two additional environments requiring software from one of the two selected software products, PeopleSoft Financial Management Solutions v8.8, with Prism by CompuSearch, or SAP America MySAP ERP v4.7, with IPRO by SAP America, to be loaded and configured. The Potential Offeror may recommend a different approach as described in Section 7.3.4. The purpose of each environment is described below. The Potential Offeror must describe how their solution would optimally be implemented and maintained within this context. The Potential Offerors are encouraged to propose best practices for production, test and development instances and environments.

6.1.8 Development Environment

The aim of the Software Development Environment is for developer design, development and testing of software modifications and customizations. Additionally, this platform will house the Software Development library, Software

Development Files, guidelines, and any restrictions, or clarifications necessary to be used by the software developers. This environment provides the tools, techniques, methods and processes to be used to develop and test systems, subsystems, and configurations for the project.

This environment will contain the same level of security as the production environment. However, the security levels must be adaptable to development scenarios. The Potential Offerors are encouraged to propose best practices for production, test and development instances and environments.

6.1.9 Test Environment

The purpose of test environment platform is for formal testing of requirement fulfillment in a clean, controlled environment as dictated by industry standards. This environment will contain the same capability for security as the production environment. However, the security levels must be adaptable to testing scenarios. The Potential Offerors are encouraged to propose best practices for production, test and development instances and environments.

6.1.10 Production Environment

The purpose of production environment platform is to support production processing and data. The Potential Offerors are encouraged to propose best practices for production, test and development instances and environments.

6.1.11 IT Back-up and Recovery

The Potential Offeror's solution must be compatible with the House backup software and hardware solutions. The solution must include written proof of interoperability, compatibility and capabilities as described in the System Specifications document, section J attachment 3.

6.1.12 Continuity of Operations Plan

The solution must include an application Continuity of Operations Plan (COOP) that is in adherence to the House technical and functional requirements. The COOP must provide secure remote access so that in the possible occurrence of a catastrophic event, consistent with the IT Back-up and Recovery Plan noted in Section 6.1.11, above, the system will be minimally impacted.

7 POTENTIAL OFFEROR'S PROPOSAL

This section outlines the required data and format for the Potential Offeror's response. The House will use this written response to identify vendors who will be invited to proceed with an oral presentation. If a section includes a table, the rows currently filled in must be answered unless otherwise noted. Additional rows can be added. Appendix 9.1 identifies the Table of Contents that the response must follow. Additional information may be included as appendices to the response.

7.1 CORPORATE PROFILE

This section details the required response information related to corporate capability. If the Potential Offeror is proposing a team solution (e.g. sub-contractors, partnerships, joint ventures or strategic alliances) separate responses should be provided for each item in Section 7.1 for the prime contractor and for each sub-contractor.

7.1.1 Facilities and Services

The House will need information of the Potential Offeror's facilities and services that will support planning, implementation, testing and potential ongoing support of the FSR program. Potential Offerors should provide a description of such facilities, indicating location, use, size of facilities support staff, length of time in use, and other relevant considerations. Additional costs associated with the use of these facilities and services should be noted in response to pricing Section 4. Potential Offerors are requested to use the format example below for this response. The current data in the table is provided only as an example.

Facility/Service	Use	Location, Support Staff Size
Usability Laboratory	*The Usability Laboratory enables developers to test the interaction with the application under development, so that changes to screen interaction, overall look, feel, intra and inter-application navigation, ease of application use are done in a controlled environment.*	*Chicago, IL, 31Full Time Employee (FTE) staff, with accommodations for up to 30 user test stations, each equipped with one-way mirrors, keyboard-eye interaction video and audio assessment for optimizing user-application interaction.*
Transition	*Provide a platform for the development of the Pilot GAGR for 3 months while the House environment is prepared for the follow on CLINs.*	*Propose*

7.1.2 Corporate Viability

Corporate viability information should include, but not be limited to, the Potential Offeror's response to their financial profile information in Section K. This information should include the ability to provide the resources necessary to support the House FSR project, including product development, product enhancements, training, and complete product life cycle

support, as well as ability to meet the demands of the Federal marketplace in terms of investment. The Potential Offeror must respond to the elements in the table using column 3. Samples are in column 2.

Response Element	Sample of Response Components		Potential Offeror Response
Number of employees per functional area	*Marketing/Sales* *Administration* *Operations* *Development*	*398* *84* *150* *184*	
Percent growth of employee base in key support areas in the last 3 years	*Customer Care* *Development* *Other*	*5% in '03* *10% in '03*	
Percent of annual revenue from each JFMIP financial management product over the last 3 years.	*SAP* *Peoplesoft*	*10%* *25%*	
Dollars spent on customer care resources/facilities in last 3 years		*$400,000 in '00* *$ 27,000 in '01* *$ 6,000 in '02*	
Annual Report			
Other metrics of Potential Offeror's choosing			

7.1.3 Commitment to Federal Marketplace

The information provided in this section should include the Potential Offeror's commitment to the Federal marketplace. This information should consider the Potential Offeror's leadership position in the Federal marketplace, their knowledge and commitment to Federal financial management systems, and their qualifications and references. References and other Federal customers of the Potential Offeror's may be contacted and must be candidates for a site visit. The Potential Offeror must respond to the elements in the table using column 3. Samples are in column 2.

Response Element	Sample of Response Components		Potential Offeror Response
Number of employees per functional area	*Marketing/Sales* *Federal Marketing/Sales* *Legislative Branch/Sales* *Administration* *Operations* *Development*	*398* *100* *15* *84* *150* *184*	
Number of employees allocated more than 50% to the Federal Marketplace	*Marketing/Sales* *Federal Marketing/Sales* *Legislative Branch/Sales* *Administration* *Operations* *Development*	*84* *100* *15* *34* *17* *35*	
Number Financial Management Systems installed in the Federal Marketplace	*No. systems* *No. users* *No. different modules in use*	*2* *1500* *21*	
Others of Potential Offeror's choosing			

7.1.4 Federal Client List

Offerors are to provide a list of up to 6 recent, in the past 5 years, Federal clients for engagements of a similar type and scope with a portion or all of the implementation successful. The following client information must be provided: Agency Name, contact name, title, telephone, and e-mail address; as well as a synopsis of the client engagements. Below is the format for this response.

Agency Name	Contact	Engagement Synopsis
Agency	Name Title Telephone e-mail	

7.1.5 Experience in the Financial Systems Marketplace

The Potential Offeror is required to provide information regarding their corporate capabilities in the enterprise financial system marketplace. Information should include such elements as the Potential Offeror's current position as a preferred integrator in the financial systems marketplace, the Potential Offeror's long term corporate viability, the Potential Offeror's investment toward resources, and the commitment of the Potential Offeror to support their customers with

training and user support in serving the financial systems marketplace. The Potential Offeror must respond to the elements in the table using column 3. Samples are in column 2.

Response Element	Sample of Response Components	Potential Offeror Response
Position in Enterprise Financial System Marketplace	*#1, based on '03 Gartner Group Survey, #2 based on '01 Bloomberg…(and attach source information), rate of increase in percent market position over last 5 years*	
	Percent net revenue redirected to research development, or for financial services customer support	
	Percent growth in revenue, not including recent acquisition considerations	
Other metrics of Potential Offeror's choosing		

7.1.6 Experience in the House Environment

The Potential Offeror must provide any detail of their experience in the House environment. This section should include all previous engagements, or a subset, with the House that could provide the Potential Offeror with insight that could potentially improve the implementation of the FSR.

7.1.7 Implementation Team

Potential Offerors must describe the proposed implementation team, including their private and Federal sector experience relevant to the selected software. Considerations will include, but not be limited to, such elements as the team's experience in integration within similar systems environments, or the expertise reflected in transitioning multiple, complex financial management systems into a single, integrated financial management system, or other substantial data conversion and data integration projects.

The House requires the Potential Offeror to provide resumes for all key personnel. The Potential Offeror may also choose to provide resumes for non-key personnel; however the same substitution criteria that apply to key personnel will apply to non-key personnel for whom resumes are provided.

7.1.8 Access to Senior Management

Potential Offerors must describe the proposed method for communication between the House and senior management for the implementation team, specifically with respect to resolving disputes, issue escalation, etc.

7.1.9 Past Performance (3 References)

Potential Offerors will be evaluated on three successful implementations of financial management systems, at least one of which must be installed previously in the Federal marketplace with JFMIP certified applications, preferably for the selected product in this proposal. Past performance must reflect successful achievement of on-time, on-budget objectives; as well as demonstrate required functionality, including any performance based contracting agreements, or quality assurance metrics. It is anticipated that these past performance references will have included proposed key personnel (see 7.1.7). Please identify for each response the proposed key personnel and their role in the implementation effort.

These references must identify the scope and challenge of the initiative, with a description of the approach and phasing of the implementation. Emphasis should be placed on unique plan and approach taken by the systems integrator. The list of required elements below must form headers for the response.

- Reference Number
- Contact Name, Title, Phone Number, Agency
- Required Functionality
- Scope of Initiative
- Challenges of Initiative
- Description of Approach
- Results Achieved
- Implementation Phases
- Variance to Completion Date and Explanation if greater than 10%
- Variance to Completion Cost and Explanation if greater than 10%
- Performance Objectives obtained as a result of integrator’s approach
- Identification of key personnel

7.2 PROGRAM MANAGEMENT

The Potential Offeror must clearly describe the methodology by which this complex and multi-discipline project will be managed. This program management methodology must be proven and all-inclusive, so that the end-to-end implementation is on-time and within-budget, and so that by all internal accounts, the FSR project is viewed as one of high quality and reflective of best practices.

Many times, an integrator has a branded methodology and toolkit by which programs are managed. If so, that methodology may be attached as an appendix to the response, however the methodology must be tailored to meet the needs of the House within the response to each section below.

The House recommends that the Potential Offeror submit a Gantt chart[8] to list the tasks, deliverables and milestones of the project, as described in Section 7.3.1. This Gantt chart should indicate timing and resources and link in with the labor categories as described in the Pricing Proposal.

7.2.1 Program Management Methodology

Potential Offerors must outline their overall methodology for program management of this FSR project. If the Potential Offeror plans to partner or combine tools or methods to accommodate House-specific requirements, then this combined methodology must be described. The methodology must describe participation by the House, roles and responsibilities, automation tools, and other enabling elements, across people, processes, and technologies.

The Potential Offeror must describe tools and methods to be used for ongoing functional requirements management. The House currently uses the Rational suite to manage requirements, and prefers to continue to use this system.

This Program Management Methodology can be supplemented by tasks and deliverables listed in the Gantt chart described in Section 7.3.1.

7.2.2 Integration Methodology

The House considers integration to encompass two main areas: staff and knowledge transfer and systems integration. The House requires that the Potential Offeror address both areas in response to this section.

Potential Offerors must describe methods and tools by which the Integration Team will obtain knowledge of the current environment. Examples are Joint Application Development (JAD) sessions, job shadowing, interviews and questionnaires. Additionally, the Potential Offeror must highlight the methodology for systems integration, including prototyping, testing, going live, and moving to full-production. This methodology must include approaches that will be tailored for House-specific requirements and integration of various functional areas and FSR modules.

The description for Integration Methodology can be supplemented by deliverables described in Section 7.3 and in the Gantt chart described in Section 7.3.1.

[8] If desired, Potential Offerors may provide their Program Management methodology using a table, flowchart, or other substitute format in lieu of a Gantt chart

7.2.3 Change Management Methodology

It is critical that the integrated solution is successfully accepted and integrated with the user community. The House expects that despite the complexity and magnitude of the integrated system, the Potential Offeror must ensure that the system will be rolled out in such a way that it minimizes the impact on the organization.

The House anticipates that business processes will be affected by FSR, and requires that the Potential Offeror describe the tools and methods used to establish business process baselines, to-be processes and GAP analysis. The Potential Offeror must describe tools and methods used to close those Gaps and ensure acceptance of the new business processes by the FSR users.

Additionally, the Potential Offeror must highlight how change management issues will be approached, including, but not limited to, the following:

- Communications Plan, to ensure targeted and broad organizational communications, not only of project status, but of issues, budget variance, updates, problem-resolutions.
- Marketing Plan, to ensure the value of the FSR project remains "front and center" despite the expected ups and downs that may occur.
- How to involve users in system planning and rollout.
- How to develop user guides and "Frequently Asked Questions (FAQ)" sheets.
- How to hold brown bag lunches for supporting ongoing Question and Answers (Q&A).
- How to establish a Super-User Group.

The description of the Change Management Plan can be supplemented by tasks and deliverables outlined in the Gantt chart described in Section 7.3.1.

7.2.4 Risk Management Plan

Potential Offerors must describe the method by which project risks will by identified and mitigated. The Risk Management Plan must include the proven tools and techniques that will be used so that the House can evaluate the adequacy of the risk management approach. The Risk Management Plan will be an important internal management tool, due to the size of this project. The description of the Risk Management Plan can be supplemented by tasks and deliverables outlined in the Gantt chart described in Section 7.3.1.

As part of the risk mitigation plan, the House requires that the Potential Offeror enter into either a two party or three party software customization escrow agreement, in the event that the software vendor becomes insolvent or no longer maintains the software the House shall be named to receive the escrowed information. In a three party agreement, the third party would be the software escrow agent. The House would like the Potential Offeror to respond with the Potential Offeror's preferred approach to executing and maintaining a software escrow agreement.

7.2.5 Quality Assurance Plan

Quality teams will consist of a technical team of hardware, software and business specialists that perform a variety of activities that support the financial services environment and the FSR project. In order to provide high quality products and services, each support team must adhere to processes, procedures and standards. Quality Assurance (QA) is a process used to monitor and evaluate the adherence to processes, procedures, and standards to determine potential product and

service quality. It involves reviewing and auditing the products and activities to verify that they comply with the applicable procedures and standards, and assuring the appropriate visibility for the results of the reviews and audits.

The Potential Offeror must propose an FSR Quality Assurance Plan (QAP) describing the deliverables, processes and procedures to use to support the consistent delivery of high-quality, professional products and services provided during the implementation Phases. This plan must provide standards against which the quality of the product/service being provided and the progress toward completion can be measured.

The House requires that QA activities must concentrate on the prevention of problems through the continuous improvement of processes and that deliverables be tailored to each Phase of the integration to meet their specific activities. There is no format for this response.

7.3 INTEGRATION DELIVERABLES

In this section of the response, Potential Offerors must describe all deliverables that will be produced for each CLIN. Descriptions may include, but are not limited to:

- Deliverable Identifier
- Deliverable Category (see below in this section for a list of categories)[9]
- Purpose of Deliverable
- How the deliverable will be created, including inputs, processes and outputs
- Who is involved in creating the deliverable, including contractors and House employees
- Where the deliverable will be developed
- If it is a repeating deliverable (such as status reports), frequency of delivery
- Other integrated deliverables
- Trace ability of deliverable to the applicable House SDLC deliverables listed below
- The roll-up of the deliverable into the House defined deliverable category defined below

The House approved SDLC policy lists a variety of required deliverables that apply to this implementation. These required deliverables are:

- *Interface Control Document*
- *System Design Document*
- *Security and Internal Control Plan*
- *System Security and Internal Control Specification*
- *GAGR Pilot Report*[10]
- *Test Plan*
- *Implementation Plan (including data cleansing and conversion)*
- *System Documentation*
- *User Acceptance or System Accreditation Document/Report*
- *Transition Plan*

[9] Note that pricing must be provided for deliverables by deliverable category within each CLIN. The format for providing this information is described in Section 4: *Pricing*.

[10] Note that since approval of the GAGR Pilot Report will be used to trigger subsequent phases of the implementation, this deliverable is not optional and may not be combined with other deliverables.

- *Training Plan*
- *User Manuals*
- *Performance Measures Documentation*
- *Program Status Reviews (includes after action review for transition to sustainment)*
- *Configuration Management Documentation*
- *Change Management Documentation*

The integrator may choose to combine deliverables or substitute deliverables based on the integrator's pre-defined methodologies. However, if the integrator combines deliverables or used substitute deliverables, the integrator must identify where the information that would pertain to each of the House SDLC defined deliverables is contained in the integrator's deliverables.

The following format should be used for mapping integrator deliverables to House SDLC deliverable category: The table should have one row for each integrator deliverable and should be grouped by House SDLC deliverable category. The comment column is optional and may be used to provide additional information as needed.

House SDLC Deliverable Category	Integrator Deliverable	Comments

For pricing purposes the integrator must group all deliverables into one of the following major deliverable categories:

- *Project Plans*. This includes management plans, personnel plans, etc.
- *Designs*. This includes general and detailed designs and may include designs for extensions/customizations, conversion, and configuration/setup.
- *Development.* This includes creation of custom code for extensions and customizations as well as implementation of configuration setups in the system. It also includes unit testing for any extensions and customizations.
- *System Tests, Testing, and Test Review*. This includes development and review of test plans, actual testing, and review of test results. This applies to extensions and customizations as well as testing to validate configuration setups and out-of-the-box system functionality.
- *Change Management*. This includes communication plans and other change-management activities.
- *Training*. This includes training on the system as well as training for any methodologies required as part of the implementation effort.
- *Conversion*. All activities related to conversion, including conversion design, development and testing specifically associated with conversion of data. Unlike the other deliverable categories, the conversion deliverable category requires the integrator a break-out into multiple deliverables including at a minimum (1) conversion design, (2) conversion development, and (3) conversion testing.
- *Transition to Sustainment*. This includes post-implementation support per phase. It is assumed that the integrator's work in this area will be of limited duration and that all sustainment tasks will ultimately be transitioned to House staff. The level of integrator involvement in post-implementation support will depend on the Potential Offeror's proposed implementation plan and methodology.
- *Platform Installation and Configuration.* This includes installation and configuration in the House environment (or in the integrator's environment for the GAGR Pilot) of all hardware and software required to support the FSR.

Note that CLINs may be grouped together into phases as part of the implementation. Deliverables associated with CLINs that are grouped may be combined if appropriate to ensure the most efficient process. For example, if core financials and purchasing are combined into a single phase, system configuration and setup designs for core financials and purchasing may be delivered in a single design document.

7.3.1 Project Management

Potential Offerors must describe their project management methodology for the solution. Project plans should be submitted in Gantt format, depicting major milestones and timelines for each proposed CLIN. Additionally, the proposed team must be reflected as resources in the project plan, with estimated hours per task. The proposed start date can be artificial however activities and resources must be related to the proposal. The plan must include:

- Detailed methodology for implementation including timeframe, overview of phases, milestones, deliverables, tasks, assumptions, roles and responsibilities.
- Project organization showing proposed staff and House personnel.

7.3.2 Version Control

Potential Offerors must provide methodologies and tools used to maintain control of development applications, builds, patches, upgrades and releases. Additionally, Potential Offerors must identify records management and control methods used for all project and solution documentation and materials. Version control should be consistent for all CLINs.

7.3.3 Process, Systems and Technical Designs

Potential Offerors must present, in detail, features and capabilities of the proposed designs that satisfies all performance requirements described in Section 6. The House recommends presenting topography diagrams and in addition to the description, provide in succinct narrative form answers to following questions:

Modular integration. What proposed modules are fully integrated (part of baseline software) into each CLIN?

Technology Architecture. What platforms do you propose? What are optimal and minimum hardware, database, server and desktop and network requirements?

Development Tools. What application tools are recommended and included? What programming skills are required to maintain the application? What tools are recommended for customizations? What monitoring is required for optimal system performance (monitoring and audit reports/logs)?

Security. What security tools are included and recommended? What is included and recommended in user and administrative profiles? How are these designed and documented?

Workflow. Describe the workflow tools in the solution. How are rules defined and documented?

Upgrade tools. What is the recommended upgrade frequency? How are patches and fixes to be applied? How are upgrades implemented? What happens to software customizations (i.e. user-defined tables and fields) during the upgrade? How many versions of the software are supported?

Reporting and analysis tool. What reporting tools are recommended? What OLAP tools are available?

Data Warehousing. What formats are recommended? What data cleansing tools are used?

7.3.4 Instance Strategy

The House anticipates three environments of the software package selected with at least one instance per "environment" (Development, Test and Production). The Potential Offeror should provide a recommendation regarding the number of instances per phase in each environment. Offerors will propose a solution that brings the best value to the House including total cost of ownership with minimum complexity.

7.3.5 Prototypes

The Potential Offeror's solution must describe where they would propose using prototypes in the implementation process.

7.3.6 Conversion

While there are several other systems used by the House to conduct the functional areas within scope of this project, there are four main legacy applications within scope, and which represent the greatest volume of data to be converted. Potential Offerors should devise a conversion plan.

> Federal Financial System (FFS), an AMS mainframe-based commercial off-the-shelf (COTS) product, modified by the House and operated through a cross-servicing arrangement with the Department of Interior's National Business Center. This is the House core financial management system.
>
> Procurement Desktop (PD) is a customized version of an AMS application that supports initiation of purchase requests and generation of purchase orders for CAO-processed purchases and other Officers of the House. PD supports solicitations, contracts, orders, BPA setups, BPA calls, receipts of goods and services, and other contract-related documents. It also serves as a front-end tool for purchase requisitions and simplified purchase orders.
>
> FAIMS (Fixed Asset and Inventory Management System) is a client server-based system for managing assets and inventory of the House. FAIMS is based on the COTS Oracle Financials product and has some degree of customization. The implementation of this system is in process.
>
> FMS (Financial Management System) is a mainframe based inventory management application. It may have its inventory data converted to FAIMS prior to implementing the inventory module of the FSR.

The data conversion activities will be conducted at the House Washington, DC Campus. Vendors should provide an estimate per CLIN of the expected resource burden on House staff to support data cleansing and data conversion. This information should be included in the table specified in Section 7.4.1: *Commitment by Staff of the House*.

The Potential Offeror must provide a narrative description of the tools and methodologies they will use for supporting data cleansing efforts prior to conversion, as well as any license fees and terms and conditions associated with them.

The intent of the House is to convert only balances and open items into the new financial system. For reporting purposes, historical data will be available through the data warehouse.

7.3.7 Integration

The Potential Offerors will demonstrate how existing applications fit into the new model, and then identify opportunities to leverage legacy applications and databases when establishing the new environment. Potential Offerors must present, in detail, features and capabilities of the proposed integration effort to include but not limited to the following:

- Design

- Approach
- Methodologies
- Tools
- Risk

7.3.8 Training

The Potential Offeror must outline the approach, methods, and overall training program. This training program must include technical, as well as end-user training. The scope must include discovery of the targeted trainees, determination of the curriculum, mapping the most effective training programs to different user groups and trainee groups. The description of Training can be supplemented by tasks and deliverables outlined in the Gantt chart described in Section 7.3.1.

7.3.9 Testing

Potential Offerors must present, in detail, features and capabilities of the proposed testing process. The testing process must address, but not be limited by, the following items:

- Methodologies
- Tools
- Test Measurement and documentation
- User Testing
- System Testing
- Unit Testing
- Integrated Testing
- Stress Testing
- Acceptance Testing

Offerors should consider iterative testing which would permit refinement of configuration approach during the implementation.

7.3.10 Transition

The Potential Offeror must provide transition and acceptance criteria and plans. This important milestone marks the acknowledgement that the system has been designed, tested and implemented according to specifications and to the House's satisfaction.

7.3.11 Sustainment

The House is requiring the Potential Offerors to propose a post implementation support solution per phase for the project life cycle (vs. product life cycle). The purpose of this solution is to ensure the House has the necessary resources and skill sets to support the system, the business and the organization after each phase. It is anticipated this would be accomplished through the transition portion of each phase. This is not intended to be a sustainment solution after all the phases of the project are complete. As the House transitions into a production environment with the new system it is anticipated all the changes (e.g. process, culture, and technology) will require support. The Potential Offeror must consider all relevant

factors associated with an implementation of this scope from deployment to transition to sustainment, while leveraging the House support structure as described in section 2.2.7 *Current Support Services.* This solution is the support component of change management described in section 7.2.3 and is the beginning of a full product life cycle customer care program. For the purposes of this contract the Customer Care program described in section 8 is to ensure post implementation support per phase of the project.

7.4 OTHER CONSIDERATIONS

7.4.1 Commitment by Staff of the House

The Potential Offeror must outline the staff support required for process definition, systems design, conversion, integration support, testing and turnover, ongoing program support, and other elements of program roll-out that will ensure the success of this initiative. Using the format below, a description of these needs must be outlined, along with skills profiles, and estimates of associated person-hours, so that appropriate planning can be made.

CLIN	Focus and Roles	Skills Description	Person-Hours

In addition, the expectations of the House staff should be outlined. This should include:

- Turnaround time
- Access to key staff
- Role in development of deliverables

7.4.2 Strategic Partnerships

Potential Offerors must describe all aspects of their strategic partner program, specifically the software vendor of the selected product, including terms and conditions of strategic partners, different levels of partnerships, and the value exchanged through the partnership in terms of leadership in the financial systems industry, expanded integration value, and benefits to end-users and customers. In particular, Potential Offerors must commit to enable the House in establishing and maintaining a direct and substantive relationship with the selected software vendor, including, but not limited to facilitating their participation in appropriate partner programs that enhance the support and success of the House FSR program. In their written response, Potential Offerors must describe the partner programs and their approach for integrating the selected software vendor into the program.

The proposal must describe the value of the strategic partnerships to the House. For example, these strategic partnerships may provide facilities and services that complement the capabilities of Potential Offeror's, or extend the Potential Offeror's applications planning, integration, and development to support House-specific requirements. These partnerships must be associated with their relevance to add value to each CLIN in which the partnership might be leveraged, including advantages with regards to pricing or resource availability. Additionally, Potential Offerors must provide a description of such strategic partnerships, indicating type of partnership (e.g. Joint Venture, special pricing, subcontracting, and exclusivity arrangements.), length of strategic partnership experience, description of partnership value of particular interest to the House, and other considerations.

7.4.3 Third Party Suppliers and Subject Matter Expertise

The Potential Offeror must outline the use of third party suppliers of key solution components or subject matter expertise (e.g. data conversion). This description must include key information on the supplier or subject matter expertise identification, as well as the contracting relationship, the ownership of associated work product, and at least one example of the use of this third party supplier in the past successfully executing a similar solution in the Federal marketplace. If listing for a subject matter expert, please provide the resume as part of the team as described in Section 7.1.7.

7.4.4 Product Development and Maintenance Support

The Potential Offeror must outline the approach, methods, and support provided to the House as part of Product Development—not just of the initial implementation, but for post-cutover development of enhancements and expansion that the House may seek in the future. This product development support must be maintainable on an ongoing basis, independent of the Potential Offeror selected for initial system implementation. Product Development Support must include formal and informal methods, classroom and OEM SW Development, and the scope must include enabling a product development toolset for use by trained staff of the House. The description of the Product Development and Maintenance Support may reference other deliverables.

8 CUSTOMER CARE

The House is requiring the Potential Offerors to propose a Customer Care Program which focuses on post implementation support solution per phase for the project life cycle (vs. product life cycle). The purpose of this solution is to ensure the House has the necessary resources and skill sets to support the system, the business and the organization after each phase. It is anticipated this would be accomplished through the transition portion of each phase. This is not intended, as part of this contract, to be a sustainment solution after all the phases of the project are complete. As the House transitions into a production environment with the new system it is anticipated all the changes (e.g. process, culture, and technology) will require support. The Potential Offeror must consider all relevant factors associated with an implementation of this scope from deployment to transition to sustainment, while leveraging the House support structure as described in section 2.2.7 *Current Support Services.* This solution is the support component of change management described in section 7.2.3 and is the foundation for a full product life cycle customer care program. For the purposes of this contract the Customer Care program is to ensure post implementation support per phase of the project.

8.1 CUSTOMER CARE

The Potential Offeror must describe all aspects of a Customer Care program, including various levels of support, which best utilizes the House support structure and best practices, including the role of the House, the selected software vendor, and the Potential Offeror. Detailed descriptions of each level of customer service must be described, with the terms and conditions of each problem resolution step clearly outlined. In their written response, Potential Offerors must describe in clear detail how the House FSR will be supported in terms of problem resolution and the customer care processes during the life cycle of the project. Specific organizations, account teams, and house-specific processes and procedures must be described.

The Potential Offeror must also describe the approach to trouble resolution, so that an understanding of the triage process between system issues and user errors can be understood. An example is noted below:

Type of Problem	Approach to Resolution	Response Cycle Time
Bug in program	*After trouble ticket is assigned, send to development staff for discovery.*	*8 hour updates of status*
System doesn't respond to user per instructions	*After trouble ticket is assigned, send to Care representative to schedule resolution session to facilitate user in clarifying interaction confusion.*	*30 minute response time*

8.2 PROCESS

The Potential Offeror must outline the process by which Customer Care is conducted. The scope of Customer Care must include all aspects of the support of the functional and systems requirements of FSR across all types of users.

8.2.1 Levels of Support

Potential Offerors must outline the levels of support, the scope and definition of these levels, and the roles and responsibilities of the associated Customer Care staff.

Customer Care Level	Scope and Definition	Customer Care Staff Title and Skill Level	Roles and Responsibilities of Associated Customer Care Staff

8.2.2 Escalation

The Potential Offeror must outline the escalation procedures that will enable the House to appropriately accelerate resolution should there be a delay or service issue. The Potential Offeror must outline the span of control of the escalation points. An example is noted below:

Escalation Point	Span of Control	Escalation Results Expectation
Care Supervisor	Performance and effectiveness of customer care rep (performance, attitude, administration & follow-up…)	A Care Rep that is not respectful will be counseled by the supervisor

8.3 PROPOSED CUSTOMER SUPPORT TEAM

The Potential Offeror must present the proposed Customer Support team, so that the House can understand not only the level of expertise, but the experience of the Customer Care teams assigned to this initiative; given the operations and systems environment.

8.3.1 Roles and Responsibilities

The Potential Offeror must describe the roles and responsibilities of the assigned Customer Care team, consistent with the proposed Customer Care process. The description of the roles and responsibilities must be illustrated with an organization chart that facilitates the depiction of the proposed Customer Care team with their client counterparts (staff of the House).

8.4 CUSTOMER CARE REFERENCES

Potential Offerors must list three Customer Care references for service since 2000. The references must include this list of required elements as headers for the response:

- Reference Number
- Contact Name, Title, Phone Number, Agency if Federal reference.
- Type of Service – care on IT implementation, care on Strategic Services.
- Scope of Contract
- Challenges of Contract
- Description of Approach

9 APPENDICES

9.1 RFP RESPONSE TABLE OF CONTENTS-FORMAT

The Potential Offerors must provide the written response to this solicitation. That written response will be structure in the order indicated by the following Table of Contents. The Potential Offeror is not obligated to respond with the maximum word limit.

Section	*Format*	*Reference*
Title Page		
Table of Contents	TOC	
Phases and CLIN Grouping	Table + Narrative 3000 words	3.2
Contact Information	Table	3.3.1
Corporate Profile		
Facilities	Table	7.1.1
Corporate Viability	Table	7.1.2
Commitment to Federal Marketplace	Table	7.1.3
Federal Client List	Table	7.1.4
Experience-Financial Systems	Table	7.1.5
Experience-House Environment	500 Words	7.1.6
Implementation Team	1000 words	7.1.7
Access to Senior Management	500 Words	7.1.8
Past Performance	500 Words per Reference	7.1.9
Program Management		
Branded Methodology	Appendix if applicable	7.2
Methodology	1000 Words	7.2.1
Integration Methodology	1500 Words	7.2.2
Change Management Methodology	2000 Words	7.2.3
Risk Management Methodology	1000 Words	7.2.4
QA Plan	No Limit	7.2.5
Integration Deliverables		
Description of Deliverables	No Limit	7.3
Integrator Deliverable to House SDLC Deliverable Mapping	Table (no limit)	7.3
Project Management	Gantt chart + 1000 words	7.3.1
Version Control	250 Words	7.3.2
Process, Systems and Technical Designs	No Limit	7.3.3
Instance Strategy	500 Words	7.3.4
Prototypes	250 Words	7.3.5
Conversion	No Limit	7.3.6
Integration	No Limit	7.3.7

Training	1000 Words	7.3.8
Testing	1500 Words	7.3.9
Transition	1000 Words	7.3.10

Section	*Format*	*Reference*
Other		
Commitment of House Staff	Table + 1000 Words	7.4.1
Strategic Partnerships	2000 Words	7.4.2
Third Party Suppliers	250 Words per Supplier	7.4.3
Product Development and Maintenance Support	1000 Words	7.4.4
Customer Care		
Methodology	1500 words	8.1
Levels of Support	Table	8.2.1
Escalation	Table	8.2.2
Roles and Responsibilities	1000 words	8.3.1
Pricing	Tables	4
Compliance Matrices	Excel Attachment	5
Any Additional Information As Appendices	As Needed	

9.2 HOUSE-SUPPORTED SOFTWARE, AS OF 1/2003

PLEASE NOTE: HIR has limited Site Licenses for some of the software listed below, allowing customers in member offices and committees to download and use it for free. Please refer to the HIR Software Site License List for details about what types of software customers may download from HIR and use.	
Accounting software:	Congressional Accounting and Personnel System (CAPS)
Antivirus software:	Trend OfficeScan
	Trend PC-Cillin*
	Trend ServerProtect (current version)
	Virex (current version)
Communications software:	Dial-up networking for Windows 98***, NT***, 2000, **XP (new)**
	Cisco VPN
	Timbuktu
Desktop Publishing:	Adobe PageMaker 6.x (Training v6.5 only)
E-mail and protocols:	Eudora
	Microsoft Exchange****
	Microsoft Exchange Administrator
	Microsoft Outlook 98, 2000, 2002
	SMTP
	Netscape Messenger
Internet Software:	Adobe Acrobat Reader 5.x
	Microsoft FrontPage 1.0 for Macintosh
	Microsoft FrontPage 98, 2000 for Windows
	Microsoft Internet Explorer 4.x***, 5.x**, **6.x (new)**
	Netscape Communicator
	Netscape Navigator 4.x, **6.x (new)**
	Quick View Plus 5.x, 6.x
	WS_FTP
PDA Synchronization:	Blackberry Desktop Manager 2.x

	HotSync
	ActiveSync
	IntelliSync
Scheduling:	Microsoft Exchange Schedule Plus****
	Microsoft Outlook Calendar
Spreadsheet:	Microsoft Excel 97, 2000, 2002
	Microsoft Excel 98 for Macintosh
Word Processing:	Microsoft Word 97, 2000, 2002
	Microsoft Word 98 for Macintosh
	WordPerfect 7.x, 8.x, 9.x
Other Supported Systems:	Avaya Intuity Message Manager
	Document Direct (INFOPAC)
	Microsoft PowerPoint 97, 2000, 2002
	Financial Disclosure

*PC-cillin - supported on House owned equipment only

****Not supported after October 2003**

*****Not supported after June 2003**

******Not supported after December 2002

9.3 HOUSE-SUPPORTED HARDWARE, AS OF 12/2003

The following list shows the minimum technical requirements for **new purchases** of computer equipment. As your computer and other technical equipment ages, please refer to the Minimum Technical Standards for **existing equipment** to determine what types HIR will continue to support.

House offices must purchase Desktop Management Interface (DMI) compliant hardware whenever available in order to lower the overall cost of PC support.

PCs	Macs	PC Laptops	Servers	Mac Laptops	Network Printers	Switches	Misc. Computer	Video Conf.

Please note a ✓ indicates a modification has been made

PC MINIMUM REQUIREMENTS	
CPU ✓	Pentium **IV 2.0 GHZ** (or equivalent AMD)*
Bus Type	2 PCI Bus slots (optional)
RAM	256 MB expandable to 1 GB without removing chips
Ports ✓	1 Serial with 16550 UART or USB **(optional)** 1 Parallel **(optional)** 2 USB Ports
CD-ROM Drive ✓	24 speed (24x) **(16x combo DVD-Rom and CDRW recommended)**
Floppy Disk	3.5" high density (optional)
Pointing Device	PS/2 style port on system board with compatible pointing device **or USB pointing device**
Hard Disk Size ✓	**20 GB (C drive partitioned with at least 15 GB; recommend drive be a single NTFS partition)**
Hard Disk Interface	IDE or SCSI
Processor Cache ✓	256 KB **L2 cache**
Keyboard	101 key enhanced
Video Display Adapter	SVGA with 4 MB VRAM and 1024x768x256 color support
Video Monitor	15" with .28 dot pitch and support for 1024x768 non-interlaced
Network Interface	IEEE 802.3 compliant; 10/100baseT connector; Preferred NICs are: 3COM, Intel, Netflex
Protocol Support	TCP/IP compliant as specified in RFC 1122 and RFC 1123
***Celeron CPU doesn't meet 256K L2 cache requirement**	

MACINTOSH WORKSTATION MINIMUM REQUIREMENTS	
CPU	500 MHz or faster iMAC G3 PowerPC G4
RAM ✓	**128** MB is required; the system should be ultimately be expandable to **256** MB without removing chips
Ports	2 USB

CD-ROM Drive	24 speed (24x) (CDRW recommended)
Floppy Disk	3.5" high density Super Drive (optional)
Keyboard	101 key enhanced
Pointing Device	Mouse port on system unit or keyboard with Macintosh compatible pointing device
Hard Disk Size ✓	**20** GB SCSI or IDE
Video Display	SVGA capabilities supporting a resolution of 1024x768 colors with 256 colors
Video Monitor	15" with .28 dot pitch and support for 1024x768 non-interlaced
Network Interface	10/100baseT connector and IEEE 802.3 compliant
Protocol Support	TCP/IP compliant as specified in RFC 1122 and RFC 1123
PC LAPTOP MINIMUM REQUIREMENTS	
CPU ✓	**Pentium IV 1.6 GHZ** (or equivalent AMD or Celeron)
Expansion Slots ✓	**2** PC Card (formerly PCMCIA) type II
RAM	**256 MB upgradeable to 512 MB**
Ports	1 Serial with 16550 UART or USB 1 Parallel 2 USB Ports
CD-Rom Drive	24 speed (24x) (CDRW recommended)
Floppy Disk	3.5" high density (optional)
Pointing Device	PS/2 style port on system board with compatible pointing device **or USB pointing device**
Battery	2 hour operating time
Hard Disk Size ✓	**20 GB** drive partitioned with at least 10 GB; recommend drive be a single NTFS partition)
Keyboard	External keyboard port capability
Video Display ✓	**12.1**" color display with external SVGA port
Network Interface	IEEE 802.3 compliant; 10/100baseT connector Preferred NICs or 3COM, Intel, Netflex
Modem	56K V.90
MAC LAPTOP MINIMUM REQUIREMENTS	
CPU ✓	**500** MHz iBook or PowerBook G4
RAM ✓	**64 MB** expandable to **256 MB** (**256 MB** recommended for high end users)
Ports	2 USB
CD-ROM Drive	24 speed (24x) (CDRW recommended)
Floppy Disk	3.5" high density (optional)
Pointing Device	Integrated pointing device

Battery	2-4 hour operating time
Hard Disk Size ✓	**20** GB
Video Display ✓	**12.1"** color display with external SVGA compatible port
Modem	56K V.90
PRIMARY FILE/PRINT/DATABASE SERVER MINIMUM REQUIREMENTS	
CPU ✓	**Pentium IV 1.26 GHz** (**Second processor recommended for server**)
Bus Type	2 PCI Bus slots
RAM	512 MB expandable to 1 GB
Ports	1 Serial with 16550 UART or USB 1 Parallel 2 USB Ports
CD-ROM Drive ✓	**48** speed (**48x**) (CDRW recommended)
Floppy Disk	3.5" high density
Pointing Device	PS/2 style port on system board with integrated compatible pointing device
Hard Disk Size	30 GB
Hard Dist Interface	SCSI II
Keyboard	101 key enhanced
Video Display Adapter	SVGA with 4 MB VRAM and 1024x768x256 color support
Video Monitor	15" with .28 dot pitch and support for 1024x768 non-interlaced
Network Interface	PCi Network Interface Card with 10/100baseT connector, or a 10/100baseT connector on the system board; IEE 802.3 compliant
Bus Type	2 PCI Bus slots
Protocol Support	TCP/IP compliant as specified in RFC 1122 and RFC 1123
Tape Backup	30 GB (must be able to backup hard disk space)
Uninterruptible Power Supply (UPS)	1400 watt (UPS must provide appropriate backup for the system)
NOTE: Applications sold by System Integrators may require hardware with higher capabilities than specified in these Minimum Standards. System Integration confirmation is recommended before purchase.	
SWITCH MINIMUM REQUIREMENTS (MEMBER DC OFFICE)	
Equipment provided by the HOUSE - CAO/HIR ✓	
NETWORK CAPABLE PRINTER MINIMUM REQUIREMENTS	
Printing Languages	PCL or Postscript
Printing Resolution	300x300 dpi
Networking	Ethernet connectivity option with TCP/IP support
If purchasing a postscript printer, the requirement is a minimum of 6 MB of RAM	

SUPPLEMENTAL COMPUTER EQUIPMENT MINIMUM REQUIREMENTS	
Optical Scanner	300x300 dpi resolution
High Speed Modem	56K V.90 (for analog connection)
Printers and copiers	Printers and copiers using Thermal Film Transfer or Dye-Sublimation technologies should not be used in House offices.
Other Computer Related Equipment	Consultation with HIR Technical Support Representative (TSR)

Note: All peripheral computer equipment with a cost of less than $500.00 does not have a minimum technical standard. However, consultation with the TSR is still required.

VIDEO CONFERENCING EQUIPMENT STANDARDS-BASED DESKTOP OR SMALL GROUP VIDEO	
Video Control and Framing	H.320 Narrow-band Visual Telephone Systems and Terminal Equipment
Audio and Voice Frequency, Narrow- and Wide-band	G.71 Pulse code modulation of voice frequencies G.722 7 kHz audio coding within 64 kbps G.728 coding of speech at 16 kbps using low-delay code excited linear prediction
Multimedia *Firewall will not pass this protocol. It is for Chat/Whiteboard /File Share/Remote Control	T.120 Transmission Protocols for Multimedia Data
Video Algorithms	QCIF Quarter Common Intermediate Format. Both SEND and RECEIVE. CI Common Intermediate Format. Both SEND and RECEIVE.